CONFIDENTIAL AND PROPRIETARY

Release Notification

Editorial Manager®

ProduXion Manager®

Commerce Manager™

Editorial Manager/ProduXion Manager
11.0 General Release Notification
04/22/14
Draft – Subject to Change

Document Change Log

Date	Version	Change
01/14/2014	Beta Release	Beta version
3/7/2014	Gamma	Moved Auto FD to PM Enhancements
4/22/2014	General	General Release Version

Editorial Manager/ProduXion Manager 11.0 General Release Notification

GENERAL ENHANCEMENTS

FundRef Integration

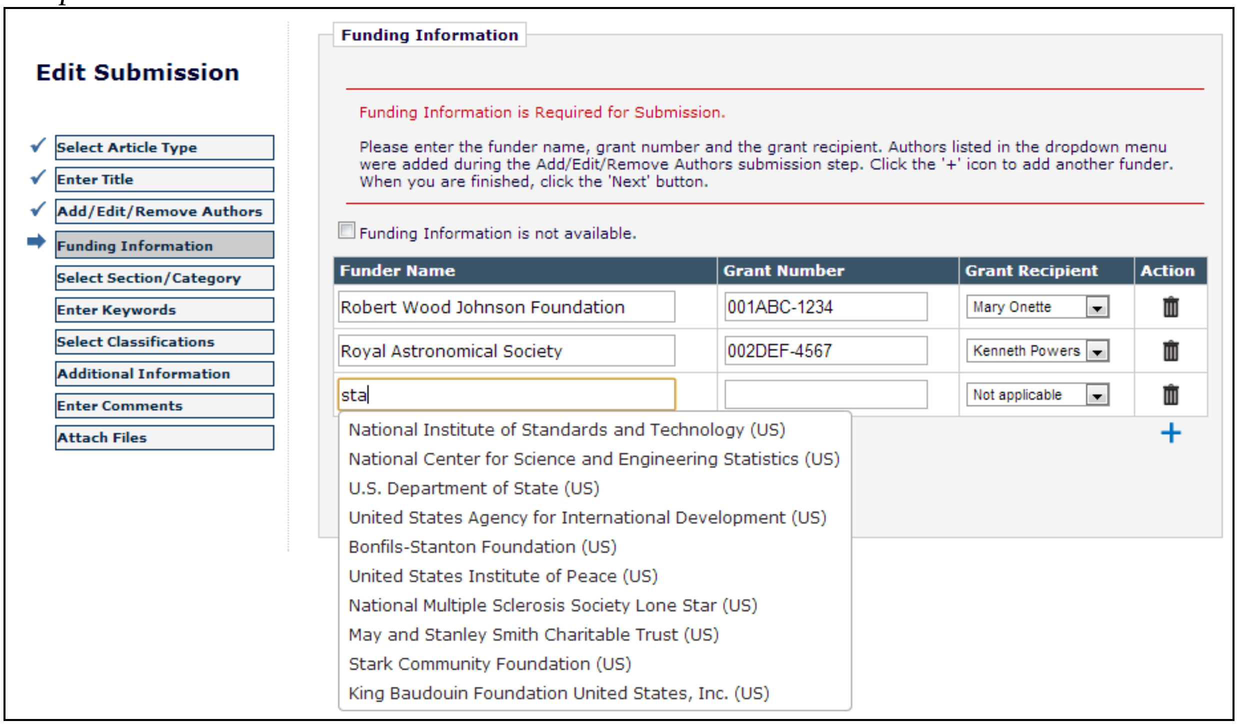
Publications may require that authors submit information about grants and other funding for their research. In EM version 10.2, funding information for an Author's research can be tracked by requiring authors to complete Custom Questions supplied by the Publication.
New in EM/PM version 11.0, authors will be able to select the funding sources for their research from FundRef's controlled list of 4000+ funding agencies. This standardized list can be enabled for use during the author submission process. Funding information provided by the author will then be available for display on the custom *Details* page, the *PDF Cover* page, and the *Transmittal Form*.

The Funding Information submission step may be configured as optional, required, or hidden for new or revised submissions. The author accesses this part of the submission process after completing any co-author information on the Add/Edit/Remove Authors submission step. Any co-author metadata entered in the previous step will be used to populate the 'Grant Recipient' drop down list in the Funding Information grid.

From the Funding Information submission step, a Corresponding Author may enter a Funder Name. After entering the first three characters of the Funder Name, a drop down menu will generate a list of up to 10 matches from the FundRef database. After selecting a Funder, the Corresponding Author may then enter a Grant Number. The Grant Recipient default is the Corresponding Author, but a drop down list allows for the selection of any co-authors entered on the Add/Edit/Remove Authors submission step as well as a 'Not Applicable' option if the research funding isn't associated with a specific author.

In the Action column of the Funding Information grid, an author may add a Funder by clicking the "+" icon. A Funder may be removed from the grid by clicking the trash can icon.

In this example Funding Information is required for submission and multiple Funders and Grant Recipients have been selected:



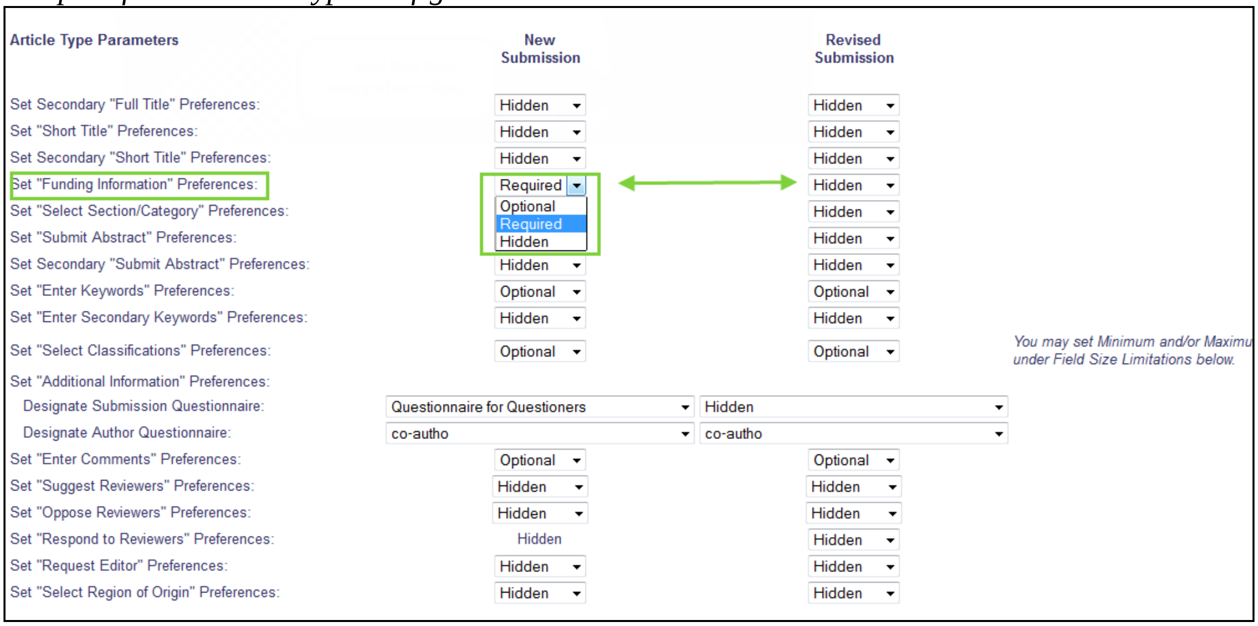
NOTE: For publications that require the completion of the Funding Information submission step, a 'Funding Information is not available' checkbox is offered to the author if they cannot provide complete funding information at the time of submission.

NOTE: Users may still enter a free-text Funder Name that is not in the FundRef database

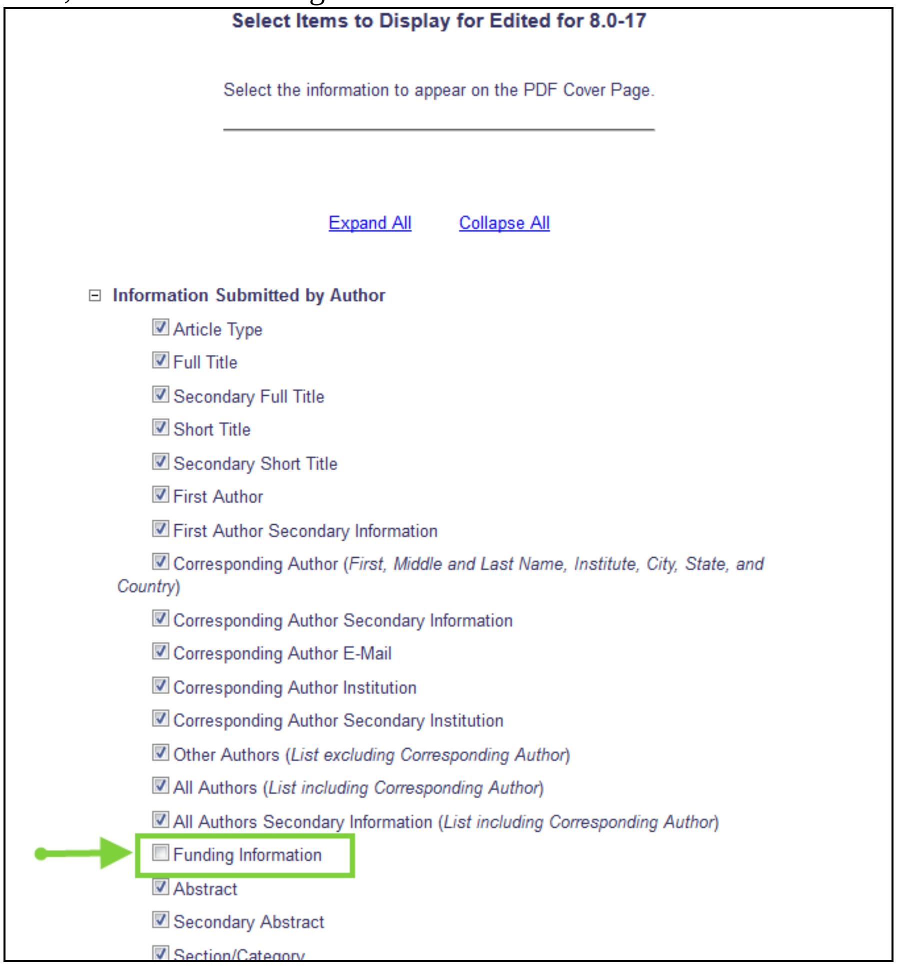
After the submission is sent to the journal, Editors and Publishers with 'Edit Submission Before Decision' or 'Edit Submission After Decision and Final Disposition' permission may edit Funding Information through Edit Submission and the Short Submission Interface.

TO CONFIGURE:
In PolicyManager, go to 'Edit Article Types' and Add or Edit any article type. In the Article Type Parameters section of the page, you will be able to configure the Funding Information submission step as Optional, Required, or Hidden for New Submissions and Revised Submissions.

Sample of Edit Article Type configuration:



To display Funding Information on the PDF cover page of a submission, go to 'Define PDF Cover Page Layouts' in the Submission Policies section of PolicyManager. On the *Add/Edit PDF Cover Page Layout* page (accessed by clicking the 'Edit link for an existing layout or the 'Add New Layout' button), click the 'Select Items to Display' link. Under the 'Information Submitted by Author' section, select the 'Funding Information' checkbox:



Once configured, the PDF cover page will display Funding Information in a grid:

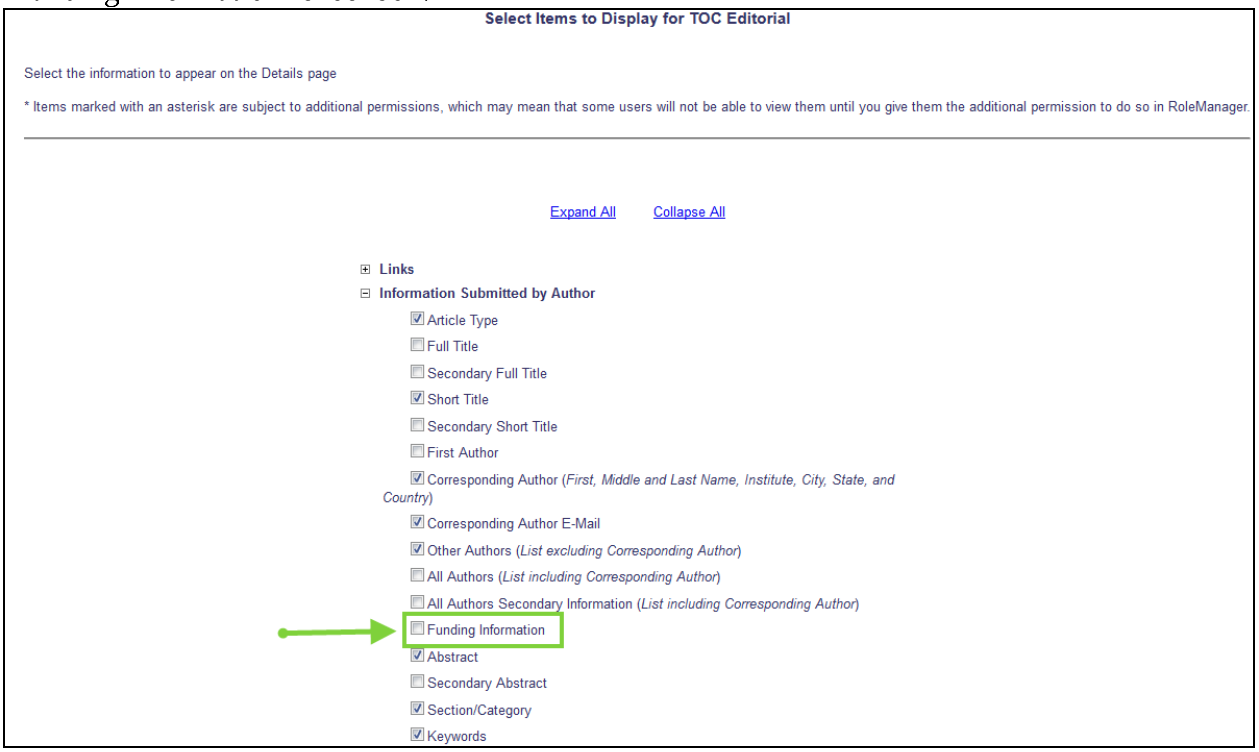
Kristin's 11.0 Testweb Site

Effectiveness of Homeopathic Remedies for Migraines

--Manuscript Draft--

Manuscript Number:	Kristin126	
Full Title:	Effectiveness of Homeopathic Remedies for Migraines	
Article Type:	Editorial's	
Section/Category:	Basic Science Section	
Keywords:	key; word; added	
Corresponding Author:	Mary Onette CYPRUS	
Corresponding Author Secondary Information:		
Corresponding Author's Institution:		
Corresponding Author's Secondary Institution:		
First Author:	Mary Onette	
First Author Secondary Information:		
Order of Authors:	Mary Onette	
	Kenneth Powers	
Order of Authors Secondary Information:		
Funding Information:	Robert Wood Johnson Foundation (001ABC-1234)	Mary Onette
	Royal Astronomical Society (002DEF-4567)	Kenneth Powers
	Stark Community Foundation (098IBG-3678)	Not applicable
Corresponding Author E-Mail:	kmahoney@ariessys.com	
Other Authors:	Kenneth Powers	
Manuscript Classifications:	20: Jelly Beans; 30: Sleeping	

To make Funding Information available for Editors and Publishers to see on the Details page, go to 'Define Details Page Layouts' in PolicyManager. On the *Add/Edit Details Page Layout* (accessed by clicking the 'Edit' link for an existing layout or the 'Add New Layout' button), click 'Select Items to Display.' In the 'Information Submitted by Author' section, select the 'Funding Information' checkbox:



Once 'Funding Information' has been enabled for the Details page layout, a link to a new *Funding Information* page will be available. Placing the cursor over this link on the Details page will produce hover text displaying Funding Information. Clicking the link produces a pop up window displaying read-only Funding Information.

Sample Custom Details page with Funding Information hover text:

Additional Manuscript Details:	Add/Edit Additional Manuscript Details
Corresponding Author:	Mary Onette , , CYPRUS [Proxy]
Corresponding Author E-Mail:	kmahoney@ariessys.com
Author Comments:	
Other Authors:	Kenneth Powers Author Status
Short Title:	
Article Type:	Editorial's
Section/Category:	Basic Science Section
Keywords:	
Classifications:	This manuscript does not have any Classifications.
Funding Information:	Funding Information
Requested Editor:	
Technical Check:	Technical Check Infor
Initial Date Submitted:	Dec 17 2013 02:49:08
Editorial Status Date:	Dec 20 2013 04:34:17
Current Editorial Status:	With Editor
Transmittal Form:	Link to Transmittal Form
Final Disposition Term:	
Corresponding Editor:	Lester Bangs, Ph.D., Editor in Chief
Submission Flags:	
Manuscript Notes:	

Funding Information	
Robert Wood Johnson Foundation (001ABC-1234)	Mary Onette
Royal Astronomical Society (002DEF-4567)	Kenneth Powers
Stark Community Foundation (098IBG-3678)	Not applicable

Sample pop-up display after clicking 'Funding Information' link from the Details page:

Funding Information for
Manuscript Number: Kristin126
"Effectiveness of Homeopathic Remedies for Migraines"

Funder Name	Grant Number	Grant Recipient
Robert Wood Johnson Foundation	001ABC-1234	Mary Onette
Royal Astronomical Society	002DEF-4567	Kenneth Powers
Stark Community Foundation	098IBG-3678	Not applicable

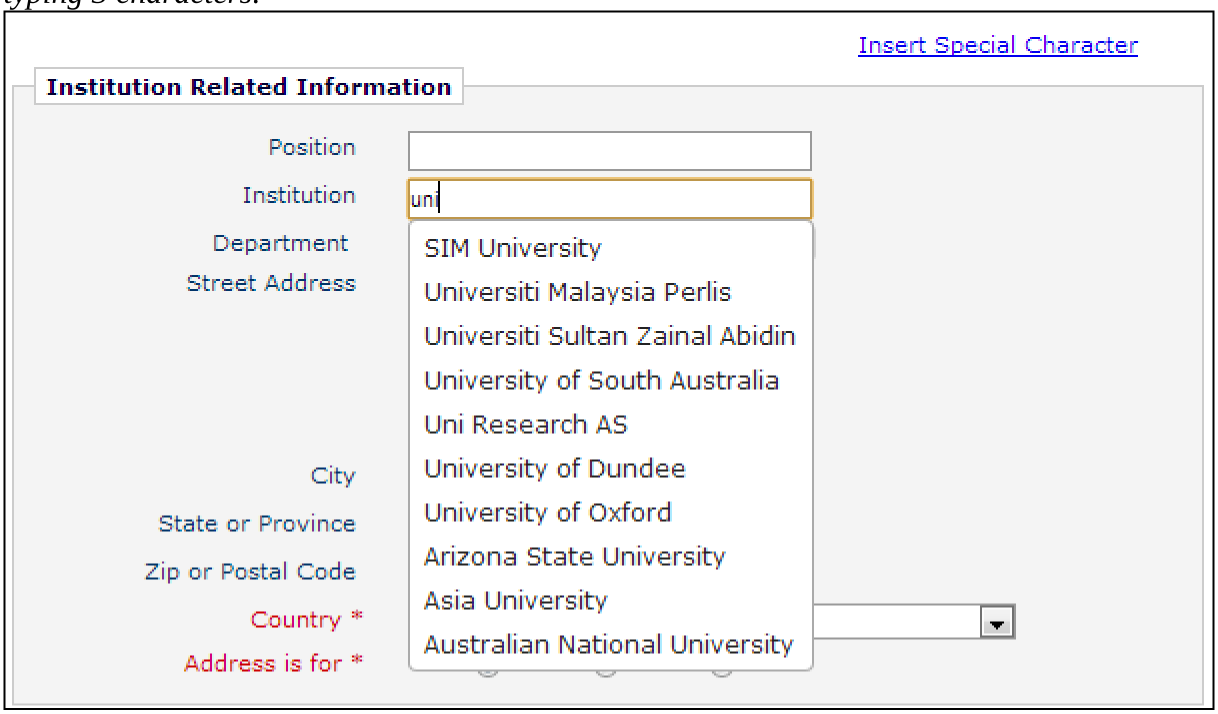
Close

Institution Name Normalization

In EM 10.2, users may enter affiliation data such as Institution and/or Department during registration. Since this information is entered manually by different users, the same entity may be recorded in a variety of different ways or abbreviations. Some publications want their user affiliations to be more standardized for a variety of reasons, including the facilitation of more accurate and timely payment of Article Processing Charges for Open Access publications.

New in EM version 11.0, when a user starts to enter Institution information, they may be presented with a list of suggested Institutions based on the characters entered matching an authoritative, standard list of Institutions. This normalized list will be available for use during Registration, Proxy Registration, Update My Information, Alternate Contact Information, Search People – Update Information, and Add/Edit Authors.

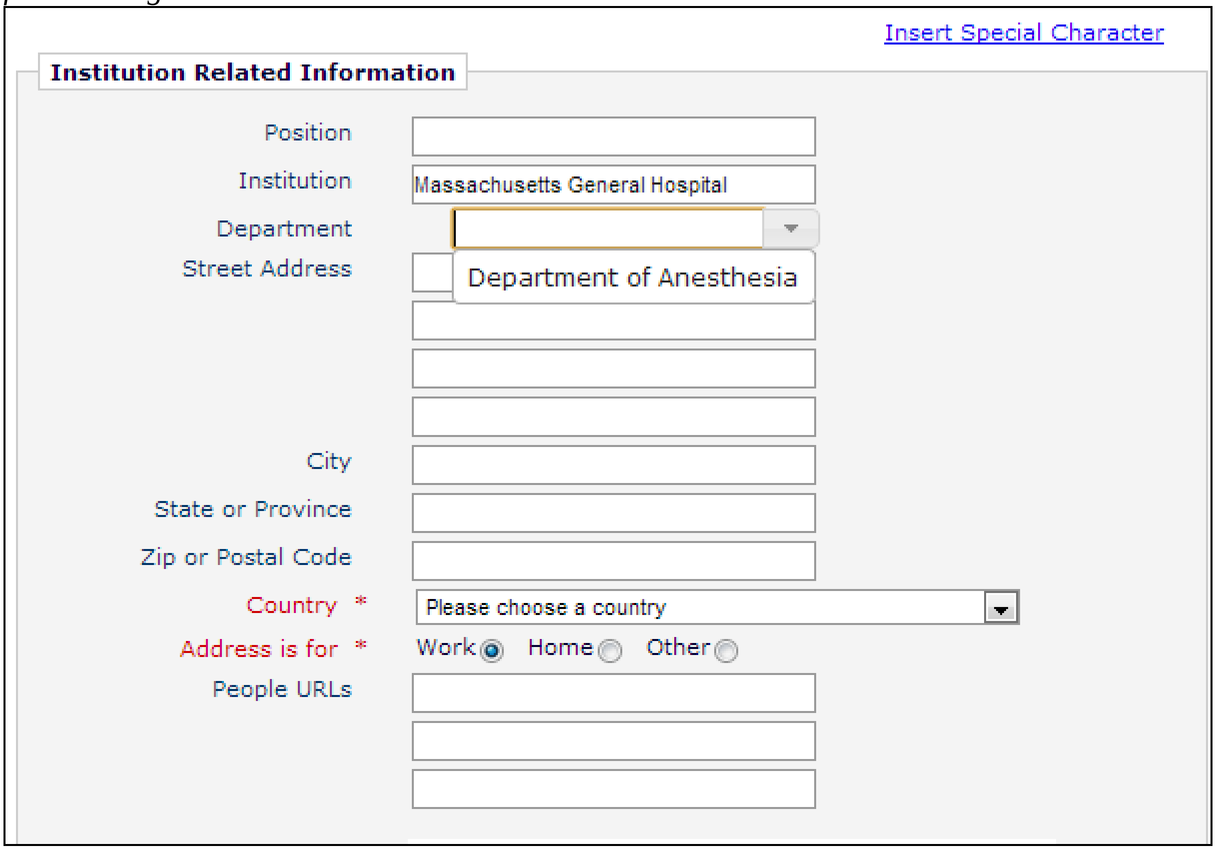
Sample Enter More Contact Information page – Institution Auto-Complete list appears after typing 3 characters:



NOTE: Users may still enter a free-text Institution that is not in the list of authoritative Institutions suggested by the system. Over time, the most frequently entered Institutions may become "authoritative" in EM either by being validated/confirmed by a third party source or by being supplied by a critical mass of users.

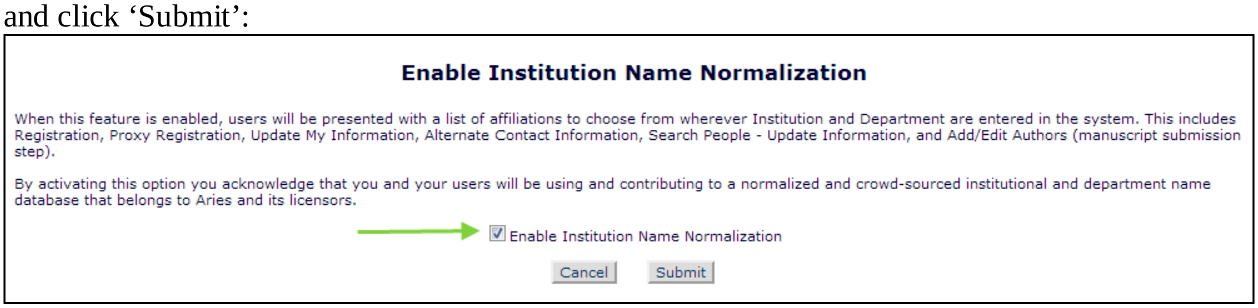
Initially, the Department field will not suggest any values to the user. Over time, the system will also suggest a list of possible Departments within the corresponding Institution. The list of suggested Departments is accumulated as a critical mass of users select/enters the same Department belonging to the designated Institution.

Sample Update My Information *page – List of Departments list is populated once the cursor is placed in the Department field and a critical mass of users have entered the same Department for the designated Institution:*



NOTE: Enabling this feature will not clear any existing affiliation data.

TO CONFIGURE:
Under the 'General Policies' section in PolicyManager, click the 'Enable Institution Name Normalization' link. On the 'Enable Institution Name Normalization' page, select the checkbox and click 'Submit':



Allow Review Sharing for Linked Submission Group

In EM/PM 10.2, Editors and Publishers may link submissions together for general reference by adding them to a Linked Submission Group.

New in EM 11.0, a Linked Submission Group can be designated as a 'Review Sharing' group. When editors invite reviewers submit a recommendation for a submission belonging to such a Linked Submission Group, they may elect to include comments from previously submitted reviews across all submissions in the Linked Submission Group that has enabled 'Review Sharing'. Newly invited reviewers are granted access to comments from previously submitted linked reviews in the Reviewer Invitation/Assignment letter using new merge codes:
%LINKED_REVIEWER_COMMENTS_TO_AUTHOR%,
%LINKED_REVIEWER_COMMENTS_TO_EDITOR% or
%LINKED_REVIEWER_RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%
.

NOTE: A submission may belong to multiple groups configured to share reviews. In this case, all completed reviews from submissions in all 'Review Sharing' linked groups will be available for inclusion in new Reviewer Invitations/Assignments.

Once enabled, editors are presented with a list of previously submitted reviews from all 'Review Sharing' Linked Submission Groups to which the submission belongs as well as any previously submitted reviews from the current submission on the *Select Reviewers – Confirm Selections and Customize Letters* page. Reviews from all revisions of the submissions will be available.

Sample Select Reviewers - Confirm Selections and Customize Letters *page - submission belongs to 2 Review Sharing Linked Submission Groups and has one completed review for the current submission*:

Select Reviewers - Confirm Selection and Customize Letters
Submission DEMO-100-6
Andrew Auuthor
"Testing 25247"

You have selected the following people as potential Reviewers

The following reviews have been submitted. You may include a copy of each review in invitations to new Reviewers by clicking the checkbox. To see the review, click the Reviewer's name. Customize each letter to edit the review text that will be seen by the Invited Reviewer, but note that customizing a letter creates a fixed copy of that letter that is not affected by subsequent changes to your selections.

Some of the listed reviews belong to other Submissions that are linked with this Submission in a Group that allows Review Sharing.

Please select any previously submitted reviews for inclusion before customizing invitation letters.

Current Submission

123 123 (Original)

In Other Release Group Group

DEMO MS NUMBER TRY	DEMO-100-5	DEMO623	DEMO-D-04-00037
Ann Reviewer (Original)	Rachel Reviewer (Original)	Richard Wynne, PhD (Original)	Ron Reviewer, MD (Original)
Bean Reviewer (Original)	Ralph Reviewer, MD (Original)		Peter Reviewer (Original)
Ron Reviewer, MD (Original)			
Roger Reviewer (Original)			

In Release Group Group

DEMO MS NUMBER TRY	DEMO668	DEMO798	DEMO-D-04-00037
Ann Reviewer (Original)	Buzz Aldrin (Original)	Ron Raptor (Original)	Ron Reviewer, MD (Original)
Bean Reviewer (Original)			Peter Reviewer (Original)
Ron Reviewer, MD (Original)			
Roger Reviewer (Original)			

Reviewers to Invite

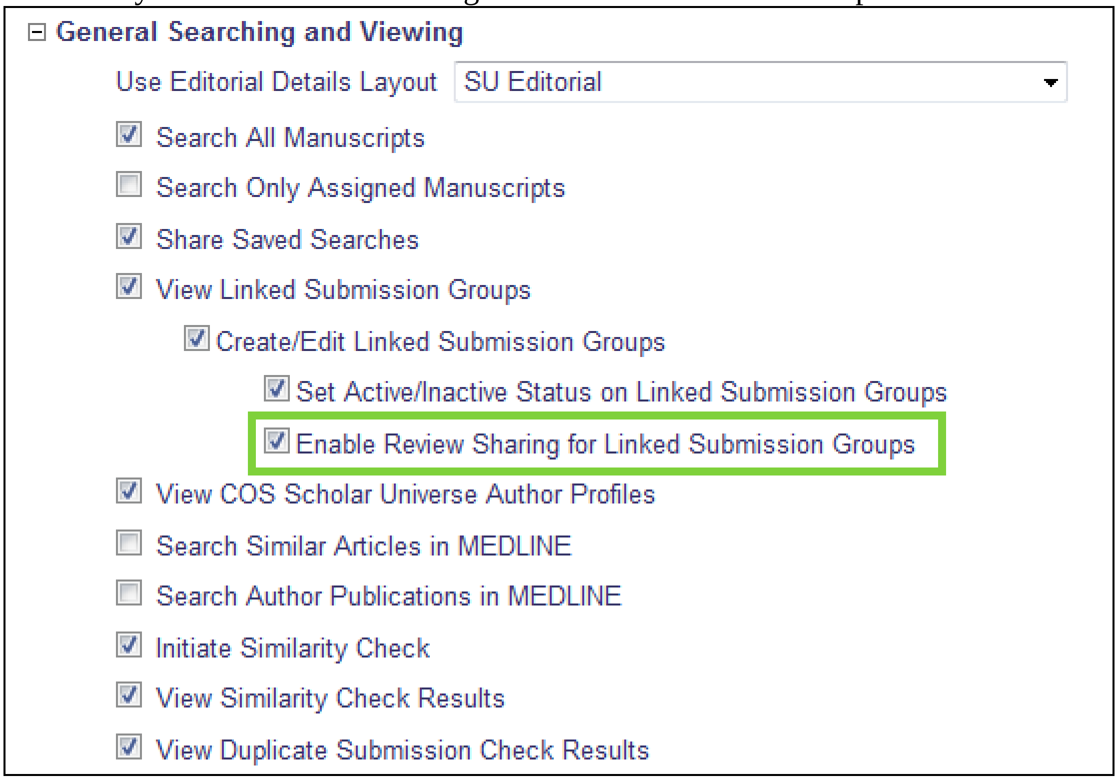
Name	Letter	Due Date	Do Not Invite
Alpha Romeo Alfalpha, REX 1 2 (Reviewer)	Reviewer Invitation Customize	01/07/2014 (mm/dd/yyyy)	
Buzz Aldrin (Reviewer)	Reviewer Invitation Customize	01/07/2014 (mm/dd/yyyy)	

Change Selections

Cancel Confirm Selections and Proceed

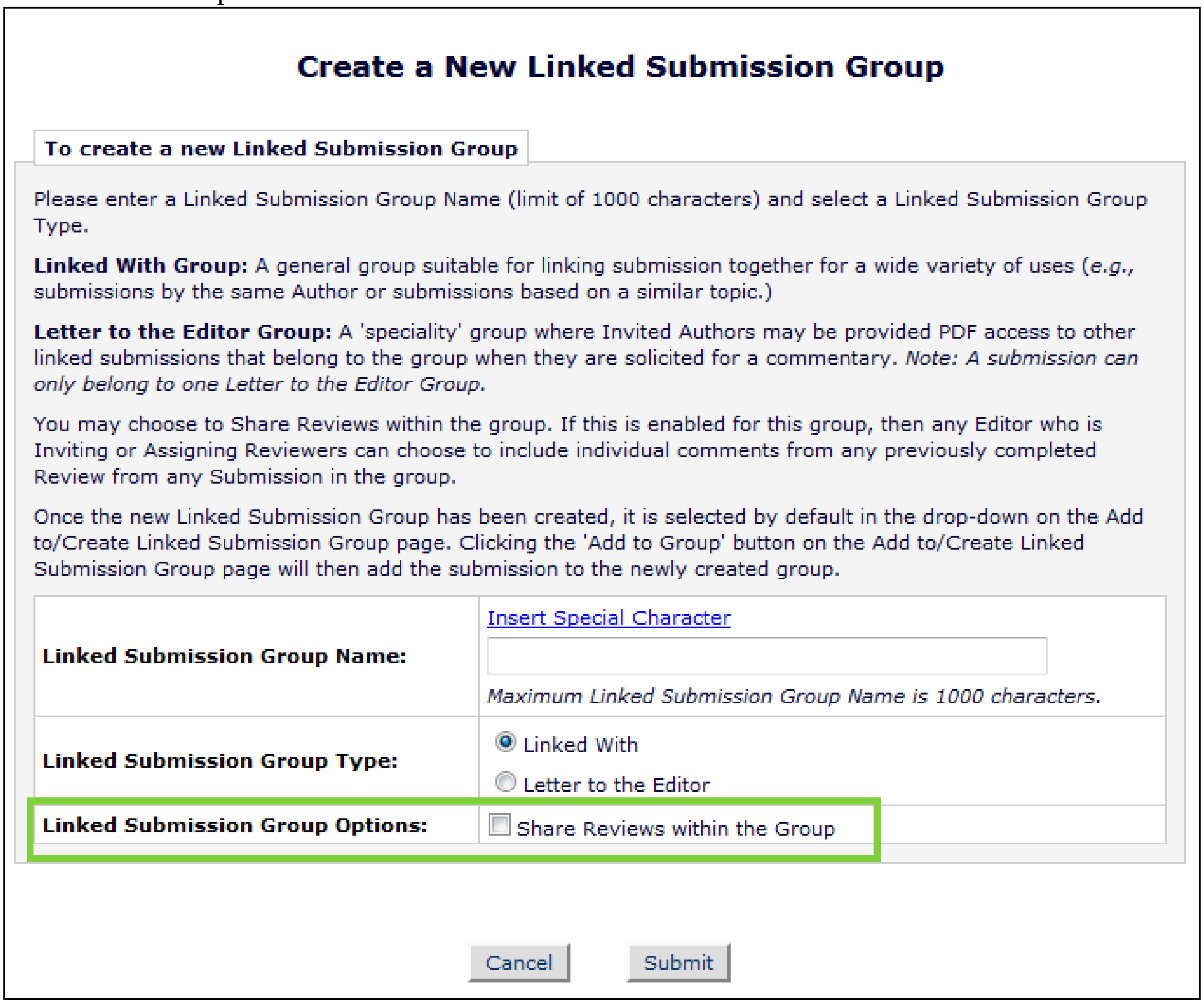
Selections made from previously submitted reviews in Review Sharing Linked Submission Groups will be merged into the Reviewer Invitation/Assignment letter via the new Linked Reviewer merge codes. Selections made from previously submitted reviews from the current submission will be merged into the Reviewer Invitation/Assignment letter via existing Reviewer merge fields. Therefore, two Reviewer Comments merge codes are necessary in the Reviewer Invitation/Assignment letter to ensure all selected reviews will be included.

TO CONFIGURE:
A new sub-permission of ‘Create/Edit Linked Submission Groups’ is added in RoleManager for Editor roles only: ‘Enable Review Sharing for Linked Submission Groups’.



Once this permission is enabled, a new ‘Share Reviews within the Group’ option is available to Editors with this Role on the ‘Create a New Linked Submission Group’ and ‘Edit Linked Submission Group’ pages.

Sample Create a New Linked Submission Group *page, accessed from* Add to/Create Linked Submission Group:



Create a New Linked Submission Group

To create a new Linked Submission Group

Please enter a Linked Submission Group Name (limit of 1000 characters) and select a Linked Submission Group Type.

Linked With Group: A general group suitable for linking submission together for a wide variety of uses (*e.g.*, submissions by the same Author or submissions based on a similar topic.)

Letter to the Editor Group: A 'speciality' group where Invited Authors may be provided PDF access to other linked submissions that belong to the group when they are solicited for a commentary. *Note: A submission can only belong to one Letter to the Editor Group.*

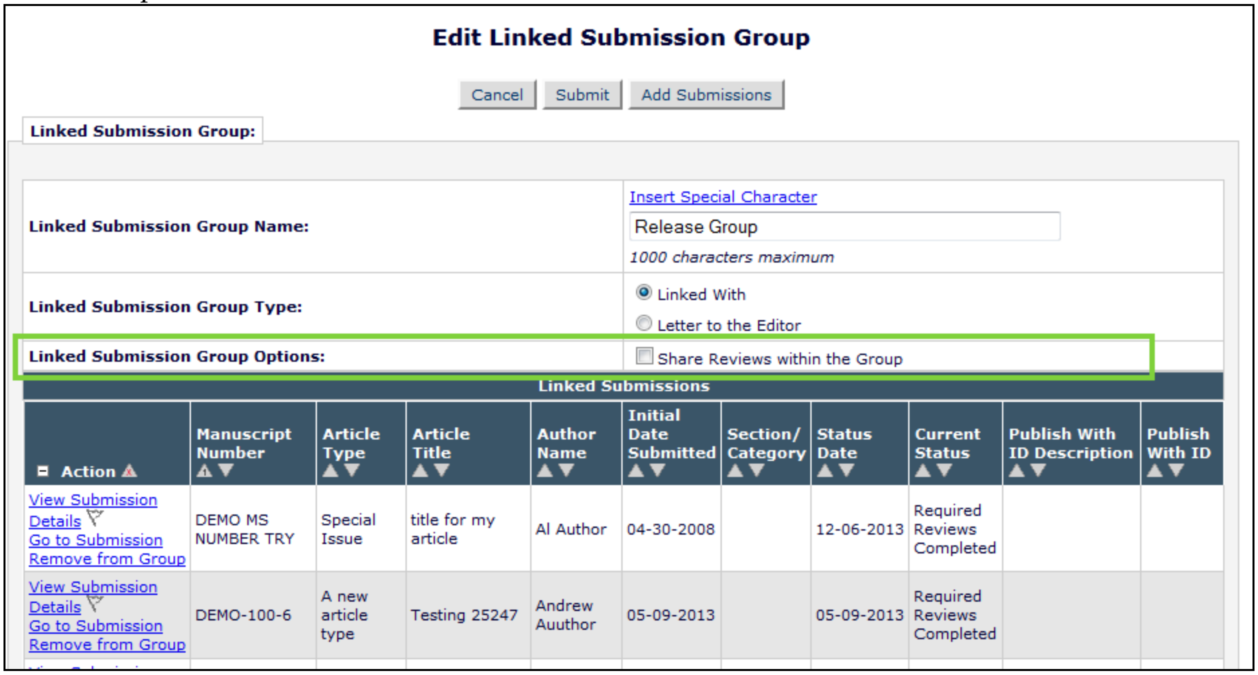
You may choose to Share Reviews within the group. If this is enabled for this group, then any Editor who is Inviting or Assigning Reviewers can choose to include individual comments from any previously completed Review from any Submission in the group.

Once the new Linked Submission Group has been created, it is selected by default in the drop-down on the Add to/Create Linked Submission Group page. Clicking the 'Add to Group' button on the Add to/Create Linked Submission Group page will then add the submission to the newly created group.

Linked Submission Group Name:	Insert Special Character *Maximum Linked Submission Group Name is 1000 characters.*
Linked Submission Group Type:	Linked With Letter to the Editor
Linked Submission Group Options:	Share Reviews within the Group

Cancel Submit

Sample Edit Linked Submission Group *page, accessed from ‘Edit Group Details’ or ‘Edit and View Group Details’ links:*



Edit Linked Submission Group

Cancel Submit Add Submissions

Linked Submission Group:

Linked Submission Group Name:	Insert Special Character Release Group *1000 characters maximum*
Linked Submission Group Type:	Linked With Letter to the Editor
Linked Submission Group Options:	Share Reviews within the Group

Linked Submissions

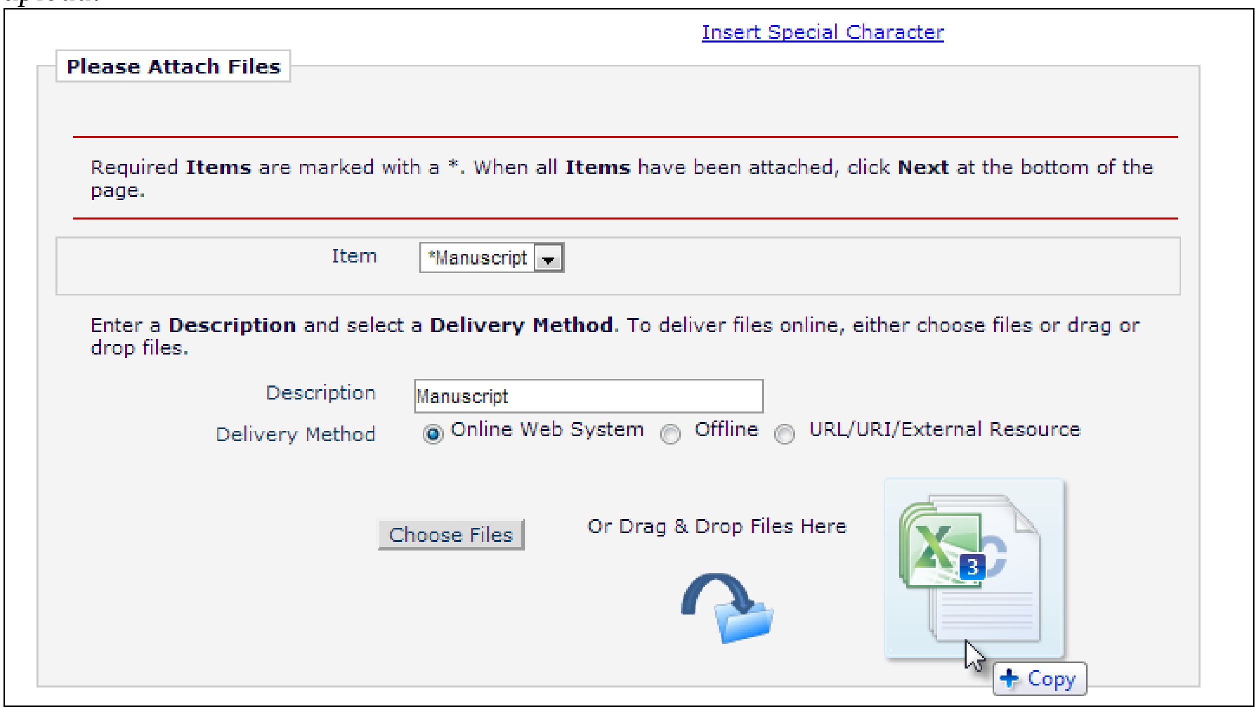
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/ Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Details Go to Submission Remove from Group	DEMO MS NUMBER TRY	Special Issue	title for my article	Al Author	04-30-2008		12-06-2013	Required Reviews Completed		
View Submission Details Go to Submission Remove from Group	DEMO-100-6	A new article type	Testing 25247	Andrew Auuthor	05-09-2013		05-09-2013	Required Reviews Completed		

Drag and Drop Files at Submission

In EM/PM 10.2, authors and editors may upload files to the system one at a time. Uploading multiple files at a time requires users to compress files into an archive, or .zip file. Users must wait until a file is completely uploaded before selecting another file to attach.

New in EM/PM 11.0, "drag and drop" functionality is introduced, allowing users to upload one or more files at a time by dragging the file from its location and dropping it right onto the Attach Files page.

Sample Attach Files page with three Excel files being dragged onto the page for upload:

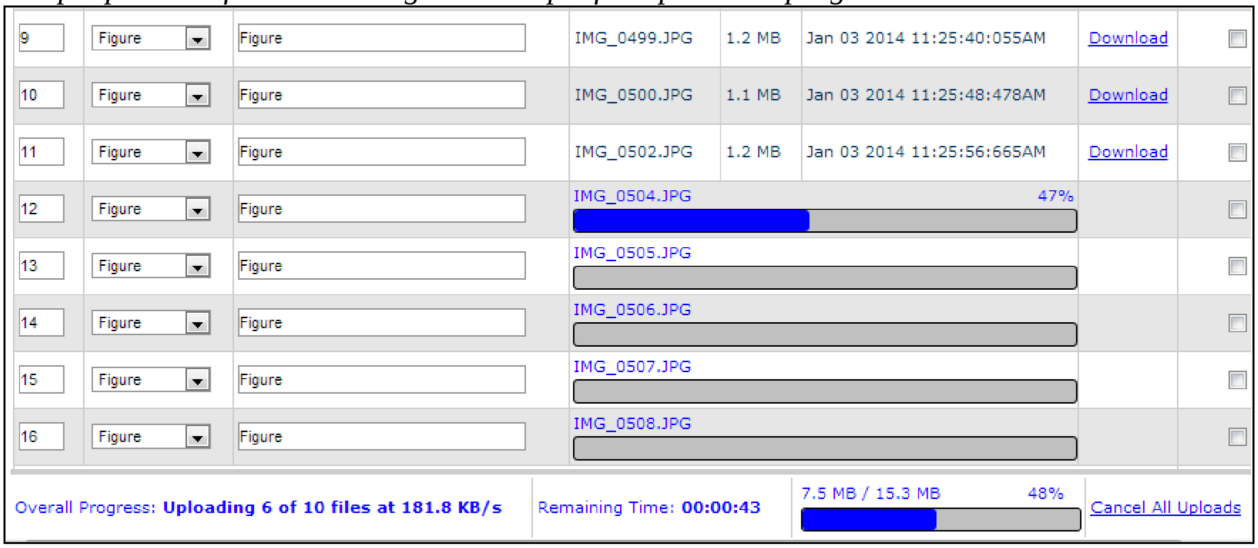


The drag and drop function is only applicable to Item Types that have a delivery method set to 'Online Web System'. Functionality for attaching information with a delivery method of 'Offline' or 'URL/URI/External Resource' is unchanged.

Additionally, users may click the 'Choose Files' button and select one or more files to upload from their computer. While files are uploading, users may select other files for upload.
NOTE: As in existing functionality, compressed files are automatically unpacked, unless the current Item Type is configured as 'do not unpack'.

Uploading files to EM with the new functionality will now show an enhanced progress indicator. Within the Attached Files grid, there is a progress bar for individual files. Along the bottom of the page, an overall progress bar tracks multiple file uploads, displaying an estimated remaining time left to completion and the option to cancel all in-progress uploads.

Sample portion of Attach Files grid– multiple file uploads in progress:



9	Figure	Figure	IMG_0499.JPG	1.2 MB	Jan 03 2014 11:25:40:055AM	Download	
10	Figure	Figure	IMG_0500.JPG	1.1 MB	Jan 03 2014 11:25:48:478AM	Download	
11	Figure	Figure	IMG_0502.JPG	1.2 MB	Jan 03 2014 11:25:56:665AM	Download	
12	Figure	Figure	IMG_0504.JPG 47%				
13	Figure	Figure	IMG_0505.JPG				
14	Figure	Figure	IMG_0506.JPG				
15	Figure	Figure	IMG_0507.JPG				
16	Figure	Figure	IMG_0508.JPG				

Overall Progress: **Uploading 6 of 10 files at 181.8 KB/s** | Remaining Time: **00:00:43** | 7.5 MB / 15.3 MB 48% | Cancel All Uploads

The browsers that currently support this functionality are:

- Internet Explorer 10+
- FireFox
- Chrome
- Safari
- Opera

Users uploading files with Internet Explorer versions 9 and earlier or Internet Explorer 10.0 in Compatibility Mode will be presented with existing functionality: Only one file may be selected at a time for upload from the 'Browse…' and 'Attach This File' buttons.

This new functionality can be accessed from any of the following pages:

- Submit Manuscript (by Author)
- Edit Manuscript (by Author)
- Revise Manuscript (by Author)
- Edit Manuscript (long and short interfaces for Editor & Publisher)
- Create Proposal (by Editor)
- Create Editorial Submission (by Editor)
- Create Submission (by Editor)

TO CONFIGURE:

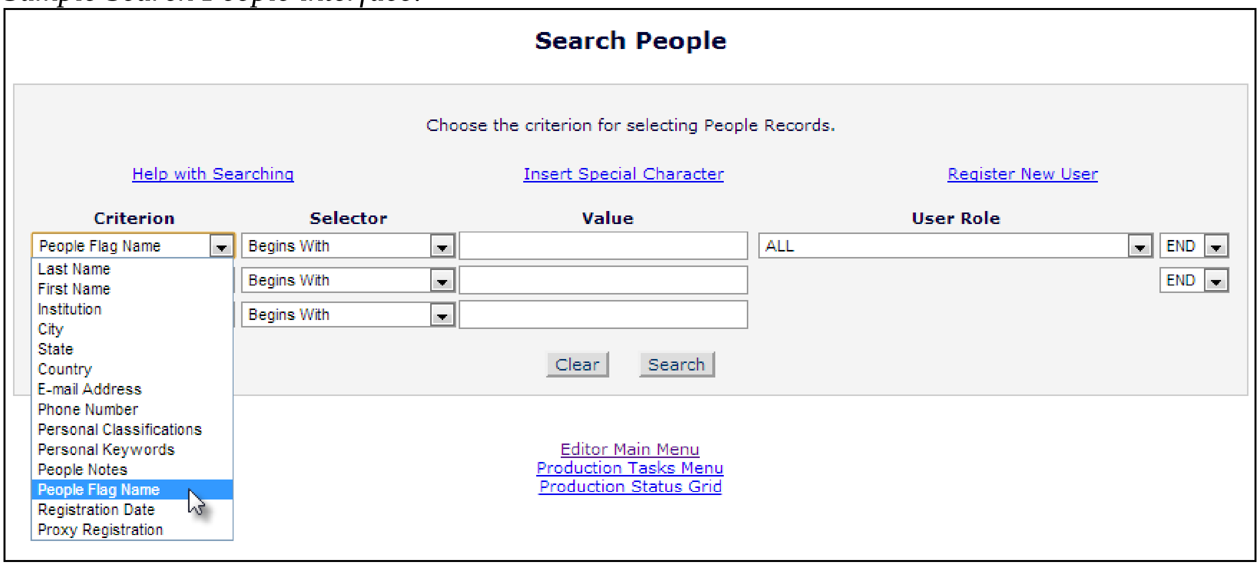
No configuration necessary. When a user navigates to the *Attach Files* page, EM determines the current browser type. If the browser supports the new feature, EM enables the drag and drop functionality and dynamic file upload.

Search People Flags

In EM/PM version 10.2, People Flags can be attached to people records and are viewable by Editors and Publishers with permission in many commonly used folders.

New in EM/PM 11.0, users may use People Flag Name as a criterion in people searches. When this search criterion is selected, the Value field refreshes to list all existing People Flags (including Flags that may have been hidden).

Sample Search People interface:



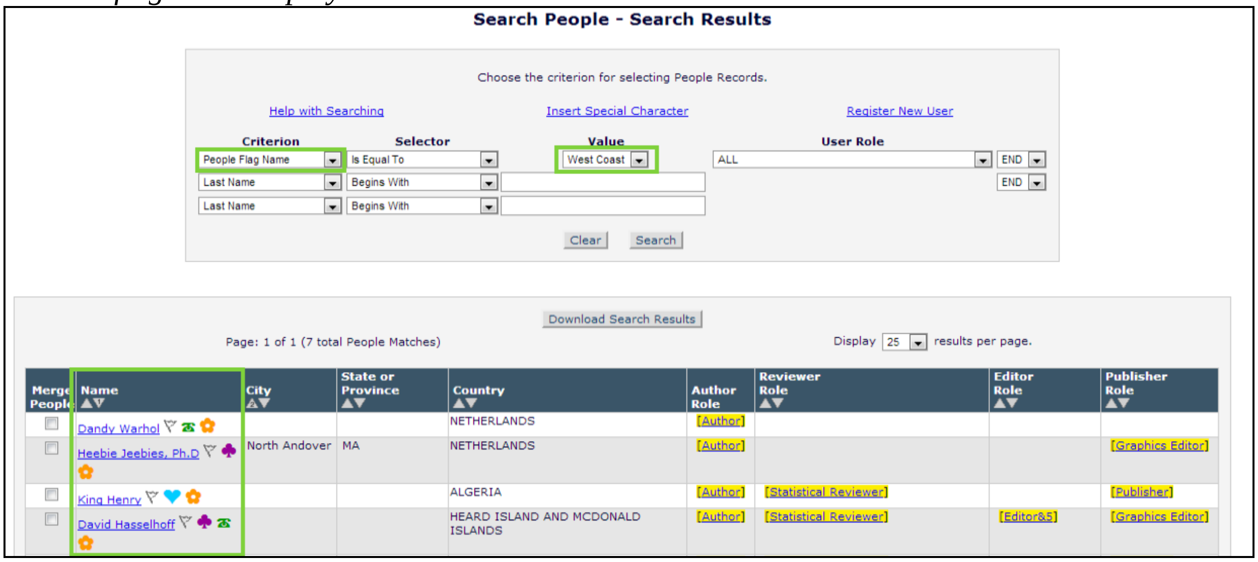
NOTE: All Custom Submission and People Flags must have defined names and cannot be left blank. Additionally, all People Flags must have unique names.

People Flag Name is added as a search criterion on the following pages:

- *Search People*
- *Search for Authors*
- *Search for Reviewers* when searching a user's own publication
- 'Search Editor' pages when Editor Search has been enabled for the publication by an Account Coordinator. These pages include:
  - *Assign Editor/Switch to New Editor*
  - *Assign Editor Search Results*
  - *Blind Editor*
  - *Initiate Discussion/Add Participants*
- *Editor Selection Summary* (for 'Suggest Editor' method of Editor assignment/invitation)
- *Editor Selection Summary - Search for Editors Results/Switch to New Editor* (for 'Suggest Editor' method of Editor assignment/invitation

NOTE: People Flag Name is not available as a criterion while searching portal-linked publications or when using the Reviewer Discovery search feature.

Sample Search People Results layout - People Flag Name selected as criterion, users with selected flag name displayed in the results:



TO CONFIGURE:

To use ‘People Flag Name’ as a search criterion, the Editor or Publisher role must have ‘View People Flags’ permission in RoleManager. The Publication must also have Customized People Flags configured, otherwise the criterion will not display.

Author and Co-Author Metadata Transmittal Form Enhancements

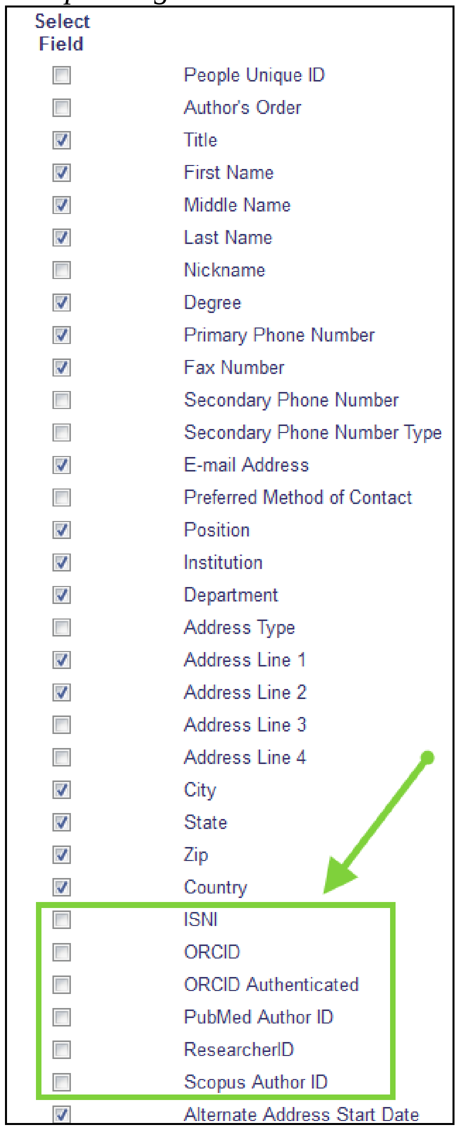
In version 10.2, Authors of a submission may be identified using any of the following Personal Identifiers: ISNI, ORCID, PubMed Author ID, ResearchID, and/or Scopus ID. This information is added to People and Co-Author records and is considered personal metadata.

In EM/PM 11.0, these Identifiers are available for use on the Transmittal Form and in the %TRANSMITTAL_FORM% merge field used in letters associated with Final Disposition. Also new in 11.0, Co-Author Metadata may be added to the Transmittal Form from a new 'Select Co-Author Metadata' link available in PolicyManager.

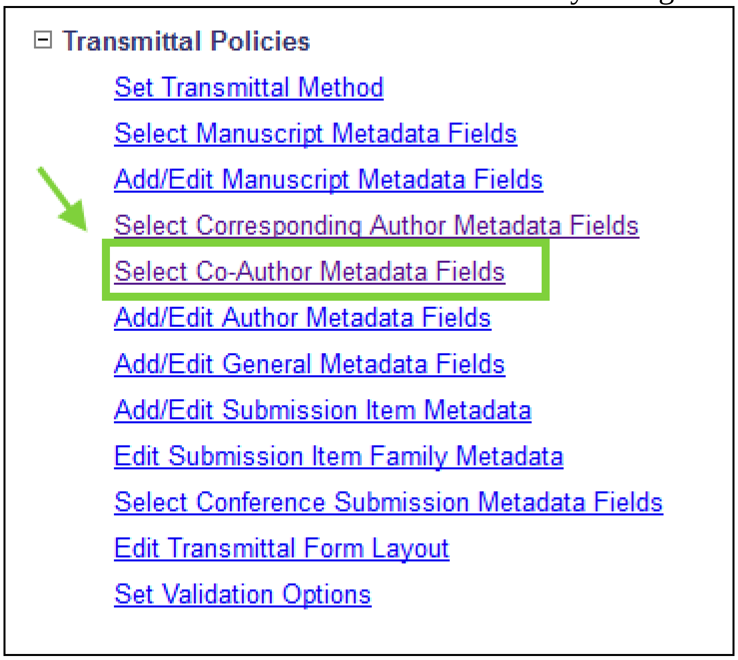
NOTE: While Personal Identifiers can be added to the Transmittal Form, they are not added to any particular Transmittal Method.

TO CONFIGURE:
In PolicyManager, go to the 'Transmittal Policies' section and click the 'Select Corresponding Author Metadata Fields' link. Select the checkboxes next to any of the Personal Identifiers to make them available on the Transmittal Form and %TRANSMITTAL_FORM% merge field.

‘Select Corresponding Author Metadata Fields’ page:



To enable Co-Author Metadata for use on the Transmittal Form, click the new ‘Select Co-Author Metadata Fields’ link in the Transmittal Policies section of PolicyManager.



Select the checkboxes of the desired Co-Author Metadata for use on the Transmittal Form and %TRANSMITTAL_FORM% merge field.

To adjust the position of the newly added Metadata fields on the Transmittal Form, go to ‘Edit Transmittal Form Layout’ in PolicyManager.

Personal Identifiers and Funding Information Added to Transmittals

In EM/PM 10.2, users may add personal identifiers to their user account such as ORCID, ISNI, PubMed Author ID, Researcher ID, and/or Scopus Author ID. New in the 11.0 release, authors may add Funding Information during submission.

New in EM/PM 11.0, this information can be included in Single Destination and Production Task transmittals when a publication is using the NLM 3.0 or JATS 1.0A transmittal method. Personal Identifiers that may be included in NLM 3.0 & JATS 1.0A Single Destination and Production Task Transmittals:

- ORCID ID
- Authenticated ORCID ID
  - The JATS 1.0A will use the specific-use= “authenticated” attribute in the contrib-id element.
  - For NLM 3.0, only the authenticated ORCID well be sent in the CML because there are no elements or attributes designed to capture this information.
- ISNI
- PubMed Author ID
- Researcher ID
- Scopus Author ID

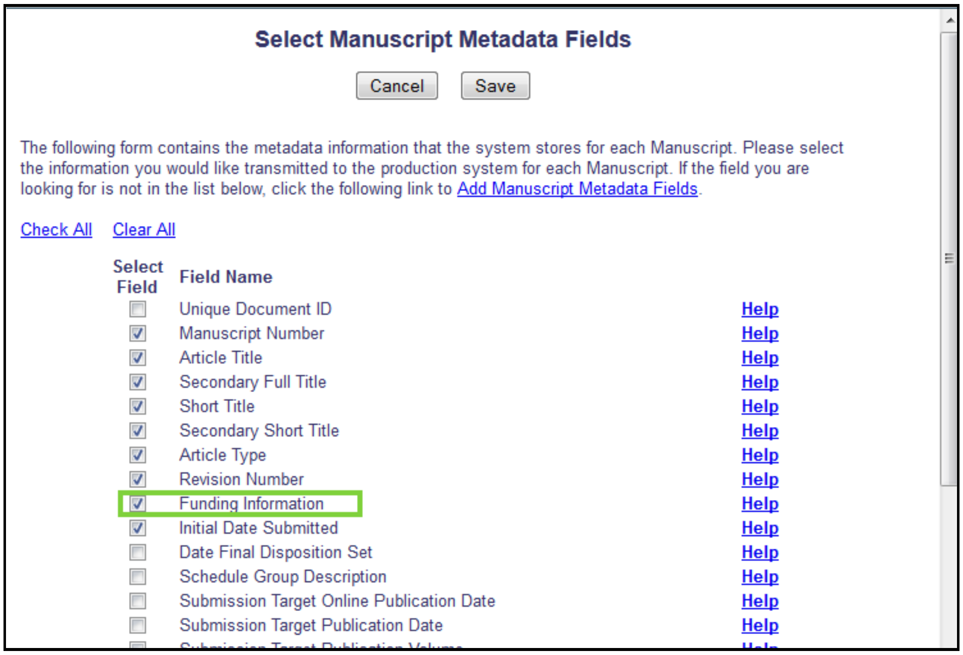
NOTE: While the option is available to transmit personal identifiers using the NLM 3.0 transmittal method, upgrading to the JATS 1.0A transmittal method is highly recommended.

Funding Information that may be captured in NLM 3.0 & JATS 1.0A Single Destination and Production Task Transmittals:

- Funder Name
- Funder ID
- Grant Number
- Grant Recipient
  - Field may contain “Not Applicable” when a recipient is not selected.

TO CONFIGURE:
To transmit this information, the publication must be using the NLM 3.0 or JATS 1.0A transmittal method.

'Funding Information' must be selected on the 'Select Manuscript Metadata Fields' page in *PolicyManager* under the 'Transmittal Policies' section:



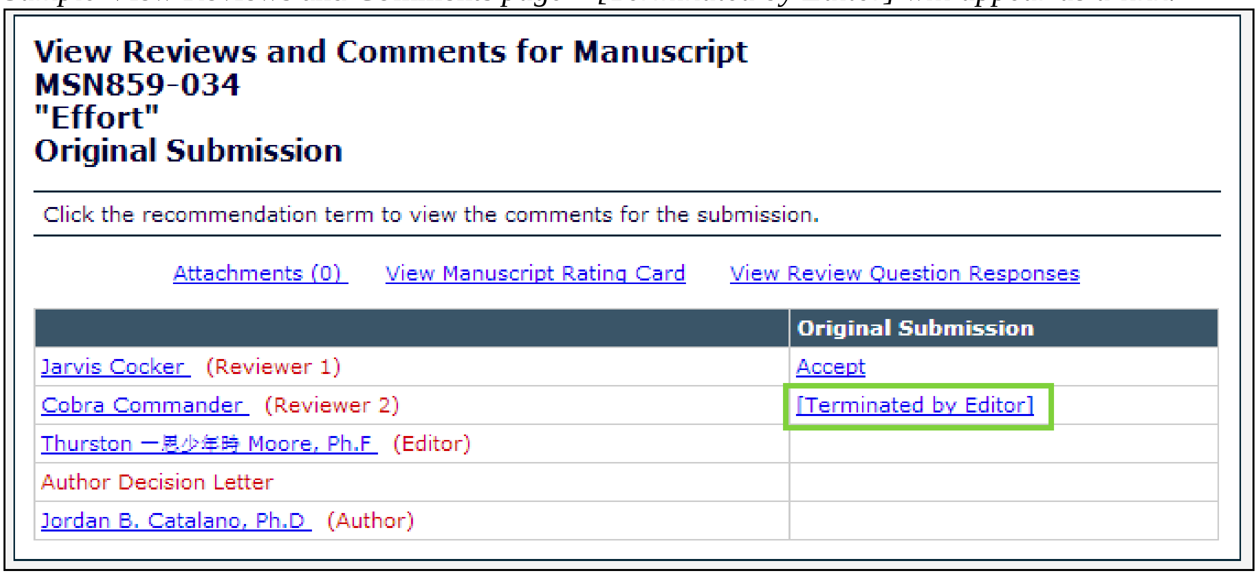
Similarly, to transmit Personal Identifier information using NLM 3.0 or JATS 1.0A, the desired identifier(s) must be selected on the 'Select Corresponding Author Metadata Fields' and/or 'Select Co-Author Metadata Fields' in the 'Transmittal Policies section of *PolicyManager*.

Complete Terminated Reviews

In EM 10.2, Editors may have permission to Edit Review that has been completed and submitted by a Reviewer.

Sometimes Editors are forced to Terminate (or Uninvite) outstanding Reviewers prematurely from a submission to move it forward in the workflow. New in EM version 11.0, Editors may have further permission to Edit Terminated Reviews within the system, in order to complete the review. From the *View Reviews and Comments* page, Editors with permission may complete Reviews from Reviewers that were Terminated after accepting the invitation (i.e. which were in progress when the decision was made to terminate them).

Sample View Reviews and Comments *page – [Terminated by Editor] will appear as a link:*



Clicking the '[Terminated by <Editor Role>]' link brings the Editor to the *View Individual Reviewer Comments* page. If Reviewer Comments were submitted (using the 'Save & Submit Later' button on the Review Form) prior to Termination, they will appear in the appropriate fields.

To complete the Terminated Review, the Editor must click the 'Edit Reviewer Comments' and proceed to fill out the Review Form. If an Overall Reviewer Manuscript Rating value was entered and saved (using the 'Save & Submit Later' button) prior to Reviewer Termination, it should carry over onto this form. After the Editor submits their changes, the originally Terminated Review will now appear to have been submitted normally by the original Reviewer, with a completion date equal to the original Termination date. This will be reflected in all Reviewer Statistics and Activity details.

NOTE: Completing a Terminated Review in this way does not trigger any ActionManager events.

Once a previously Terminated Review has been edited and completed by an Editor, the submission will appear in the Reviewer's *Completed Assignments* folder and they will be able to view the Review from the 'View Reviews and Comments' link.

NOTE: A Review that was terminated before the reviewer accepted the assignment cannot be edited in this way – the [Terminated by Editor] term will not appear as a link on the *View Reviews and Comments* page.

TO CONFIGURE:
A new sub-permission of 'Edit Reviewer Comments and Ratings after Review is Submitted' called 'Edit and Complete Reviews Terminated after Accepting Invitation' is added to Editor RoleManager to allow the completion of Terminated Reviews:

Sample Editor RoleManager page:

Individual Reviewer Comments to Author

In EM 10.2, during Editor Decision handling, all Reviewer Comments to Author are aggregated into the Editor's 'Comments to Author' field along with any Editor Comments to Author and are inserted into the Decision/Author Notification letter in a single block. If a publication operates a chain of Editors, then the Editor Comments to Author field – which includes the previously submitted Reviewer Comments to Author – is copied up the chain, with each Editor adding their own comments to the previous version.

New in EM 11.0, Review Forms may be configured to keep Reviewer Comments to Author separate from the Editor Comments to Author. The Individual Reviewer Comments to Author will then be available for selection on the Editor Decision page for inclusion in the Decision/Author Notification letter; Individual Reviewer Comments are inserted as a separate block of text, using a new merge code specifically for these.

NOTE: The Individual Reviewer Comments to Authors are still copied into the Editor chain; so the version that is seen and worked on by the in-chain Editors is not the original version submitted by the Reviewers. Individual Reviewer Comments are copied up the chain, in the same way as the main Editor Comments to Author field is under current functionality, so each editor therefore sees their own copy of the Individual Reviewer comments.

Once enabled for one or more review forms, each Reviewer's Comments to Author appear to Editors submitting a decision as its own editable field. A checkbox next to the Reviewer name allows the Editor to decide whether the Reviewer Comments to Author should be merged into the Decision/Notification Letter. These selections, and the final text if edited by the Editor, are passed up the Editor chain and can be changed by subsequent handling editors. An asterisk next to the Reviewer Number indicates that the comment has been edited.

Sample Editor Decision and Comments page – Individual Reviewer Comments enabled:

NOTE: In a workflow where more than one Editor Decision is rescinded (i.e. The most recent Editor Decision is rescinded and then the previous Editor Decision is rescinded), the copies of all Individual Comments to Author for the most recent Editor Decision are removed.

Once selected, the individual Reviewer Comments to Author may be merged into new Individual Comments merge fields for Decision/Author Notification letters: %INDIVIDUAL_REVIEWER_COMMENTS_TO_AUTHOR% and %RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%.

NOTE: The %COMMENTS_TO_AUTHOR% merge field will still need to be used to insert the Editor Comments to Author if the Editors use this to record their own comments.

TO CONFIGURE:
To enable the use of Individual Reviewer Comments to Author, go to *Create/Edit Review Forms* in the 'Reviewer and Editor Form Policies' section of PolicyManager. Add a new Review Form or Edit an existing form. Two new radio buttons are added below the 'Display Comments to Author text box': 'Merge into Editor Comments in Decision Chain' (existing functionality) and 'Keep separate from Editor Comments in Decision Chain' (new functionality).

Sample Edit Review Form *page:*

Select the 'Keep separate from Editor Comments in Decision Chain' radio button to enable Individual Reviewer Comments to Author.

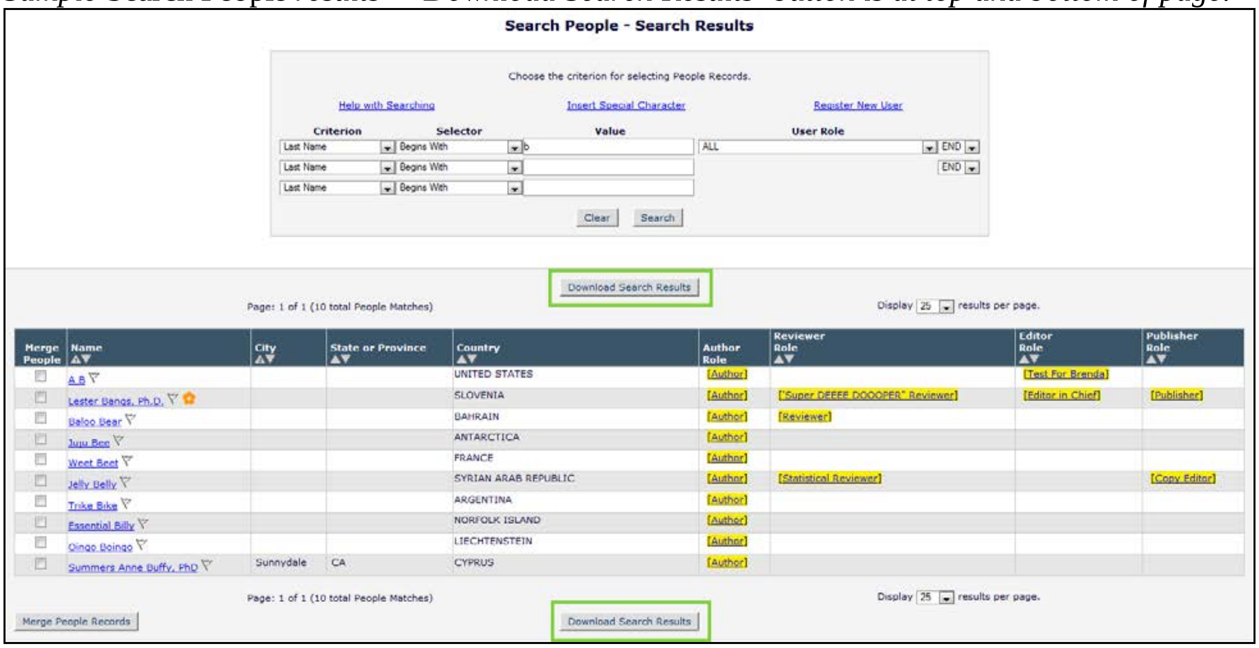
NOTE: Since this configuration is defined by the Reviewer Form, it is possible to combine both existing functionality with the new Individual Reviewer Comments. For exmaple, an Editor may be invited to adjudicate on on a Reviewer dispute, but use a Reviewer Role to do so. The publication may opt to use a Review Form for this 'Editorial Review' that does not keep the comments separate, but instead merges their comments into the Editor Comments to Author as before. Conversely if a publication would like to impose a blanket policy of using Individual Reviewer Comments, this option must be configured for all Review Forms.

Download Search Results

In EM/PM 10.2, users may run search queries for people records, submissions, and proposals.

New in EM/PM version 11.0, users may download the results from queries run from Search People, Search Submissions, and Search Proposals. A new 'Download Search Results' button will allow the user to download a tab delimited text file in UTF-8 format containing the search results.

Sample Search People *results – 'Download Search Results' button is at top and bottom of page:*



TO CONFIGURE:
No configuration necessary. Users with permission to search will see the 'Download Search Results' buttons on the results of queries run from Search People, Search Submissions, and Search Proposals.

Merge People Audit Trail

In EM/PM 10.2, administrators may merge two user records if it is found that they are duplicates. When records are merged, one of the two records is made inactive and any assignments associated with that user are reassigned to the retained user record.

New in EM/PM 11.0, a ‘Merge Duplicate Users Audit Trail’ reporting view is added so administrators may view data associated with the inactivated user record after a merge has been completed. This view may be used with Custom Reports, Enterprise Analytics Reporting, Cross-Publication Enterprise Analytics Reporting, or a reporting server. The underlying ‘Merge Duplicate Users Audit Trail’ table, which contains a subset of the data, may also be accessed from General Data Export.

The database fields added to this view are as follows:

Fields:

Superseded Address Line 1
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.ADDRESS1]
The first line of the superseded user's primary address at the time the merge was conducted

Superseded Address Line 2
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.ADDRESS2]
The second line of the superseded user's primary address at the time the merge was conducted

Superseded Address Line 3
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.ADDRESS3]
The third line of the superseded user's primary address at the time the merge was conducted

Superseded Address Line 4
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.ADDRESS4]
The fourth line of the superseded user's primary address at the time the merge was conducted

Superseded City [MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.CITY]
The superseded user's city from their primary address at the time the merge was conducted

Superseded Preferred Method of Contact
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.CONTACTTYPE]
The superseded user's preferred method of contact as set when the merge was conducted

Superseded Country [MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.COUNTRY]
The superseded user's country from their primary address at the time the merge was conducted

Superseded Degree [MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.DEGREE]
The superseded user's degree as recorded at the time the merge was conducted

Superseded Department
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.DEPARTMENT]
The superseded user's department, from their primary address at the time the merge was conducted

Superseded Fax Number [MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.FAX]
The superseded user's fax number, as recorded in their primary address record at the time the merge was conducted

Superseded First Name
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.FIRSTNAME]
The superseded user's first name as recorded in their people record at the time of the merge

Superseded Nickname
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.GREETING]
The superseded user's nickname as recorded in their people record at the time of the merge

Merge Initiator Editor Role
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.INITIATOR_EDITORROLE]
The Editor Role of the user who performed the merge
Hints: If the user performing the merge is proxied in as someone else, this is the actual user's Editor Role, not the user into whose account they are proxied. If the merge was initiated on another publication, this is their Editor Role from that publication. If the merge was initiated by the user while logged into another linked publication, this is their Editor Role in that publication.

Merge Initiator First Name
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.INITIATOR_FIRSTNAME]
The first name of the user who performed the merge
Hints: If the user performing the merge is proxied in as someone else, this is the actual user's first name, not the user into whose account they are proxied. If the merge was initiated by the user while logged into another linked publication, this is their first name as recorded in their user record for that publication.

Merge Initiator Global User ID
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.INITIATOR_GUID]
The Global User ID of the user who performed the merge
Hints: If the user performing the merge is proxied in as someone else, this is the actual user's GUID, not the user into whose account they are proxied. If the publication is not in a people sharing group, this will be null.

Merge Initiator Last Name
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.INITIATOR_LASTNAME]
The last name of the user who performed the merge.
Hints: If the user performing the merge is proxied in as someone else, this is the actual user's last name, not the user into whose account they are proxied. If the merge was initiated by the user while logged into another linked publication, this is their last name as recorded in their user record for that publication.

Merge Initiator People ID
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.INITIATOR_PEOPLEID]
The People ID of the user who performed the merge
Hints: If the user performing the merge is proxied in as someone else, this is the actual user's People ID, not the user into whose account they are proxied. If the merge was initiated by the user while logged into another linked publication, this is null.

Merge Initiator Proxied
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.INITIATOR_PROXIED]
If this field is set to '1' (TRUE) the merge initiator was proxied in as another user at the time they initiated the merge.

Merge Initiator Publication
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.INITIATOR_PUBLICATION_FULLTITLE]
The Full Title of the publication the merge initiator was logged into when they initiated the merge.

Superseded Institution
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.INSTITUTE]
The superseded user's institution as recorded in their primary address record at the time the merge was conducted

Superseded ISNI [MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.ISNI]
The superseded user's ISNI as recorded at the time the merge was conducted

Superseded ISO Country Code
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.ISO_CODE]
The ISO Country Code of the superseded user's primary address record at the time the merge was conducted

Superseded Last Name
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.LASTNAME]
The superseded user's last name as recorded in their people record at the time of the merge

Merge Date [MERGE_DUPLICATE_USER_AUDIT_TRAIL.MERGE_DATE]
The date and time at which the merge was initiated.

Merge Duplicate Users Audit Trail ID
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.MERGE_DUPLICATE_USER_AUDIT_TRAIL_ID]
Uniquely identifies each record in the Merge Duplicate Users Audit Trail table.

Superseded Middle Name
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.MIDDLENAME]
The superseded user's middle name as recorded in their people record at the time of the merge

Superseded ORCID [MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.ORCID]
The superseded user's ORCID as recorded at the time the merge was conducted

Superseded ORCID Authenticated
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.ORCID_AUTHENTICATED]
If this is set to '1' (TRUE), then the superseded user's ORCID was authenticated by the user before the merge was conducted

Superseded Personal Identifier ID
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.PERSONAL_IDENTIFIERS_ID]
The Personal Identifier ID associated with the superseded user record

Superseded Secondary Phone Number Type
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.PH2TYPE]
The type of the secondary phone number associated with the primary address of the superseded user record

Superseded Primary Phone Number
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.PHONE]
The primary phone number recorded in the primary address record associated with the superseded user

Superseded Secondary Phone Number
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.PHONE2]
The secondary phone number recorded in the primary address record associated with the superseded user

Superseded People Notes
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.PNOTE]
The People Notes associated with the superseded user record at the time the merge was conducted

Superseded Position [MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.POSITION]
The superseded user's position as associated with their primary address at the time the merge was conducted

Proxy Merge Initiator Editor Role
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.PROXY_INITIATOR_EDITORROLE]
The Editor Role of the user that the initiator was proxied in as

Proxy Merge Initiator First Name
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.PROXY_INITIATOR_FIRSTNAME]
The first name of the user that the initiator was proxied in as

Proxy Merge Initiator Last Name
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.PROXY_INITIATOR_LASTNAME]
The last name of the user that the initiator was proxied in as

Proxy Merge Initiator People ID
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.PROXY_INITIATOR_PEOPLEID]
The People ID of the user that the initiator was proxied in as

Superseded Title [MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.PTITLE]
The superseded user's title as recorded at the time the merge was conducted

Superseded PubMed Author ID
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.PUBMEDAUTHORID]
The superseded user's PubMed Author ID as recorded at the time the merge was conducted

Superseded Account Registration Date
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.REG_DATE]
The date on which the superseded user record was originally registered

Superseded ResearcherID
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.RESEARCHERID]
The superseded user's ResearcherID as recorded at the time the merge was conducted

Retained Degree [MERGE_DUPLICATE_USER_AUDIT_TRAIL.RETAINED_DEGREE]
The degree of this user as recorded in the people record that was retained after the merge

Retained First Name
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.RETAINED_FIRSTNAME]
The first name of this user as recorded in the people record that was retained after the merge

Retained Greeting [MERGE_DUPLICATE_USER_AUDIT_TRAIL.RETAINED_GREETING]
The greeting for this user as recorded in the people record that was retained after the merge

Retained Global User ID
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.RETAINED_GUID]
The Global User ID of the people record that was retained after the merge

Retained Last Name
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.RETAINED_LASTNAME]
The last name of this user as recorded in the people record that was retained after the merge

Retained Middle Name
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.RETAINED_MIDDLENAME]
The middle name of this user as recorded in the people record that was retained after the merge

Retained People ID
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.RETAINED_PEOPLE_ID]
The People ID of the people record that was retained after the merge

Retained Title [MERGE_DUPLICATE_USER_AUDIT_TRAIL.RETAINED_TITLE]
The title of this user as recorded in the people record that was retained after the merge

Superseded Scopus Author ID
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.SCOPUSAUTHORID]
The superseded user's Scopus Author ID as recorded at the time the merge was conducted

Superseded Secondary Address Line 1
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.SECONDARY_ADDRESS1]
The secondary version of the first line of the superseded user's primary address at the time the merge was conducted

Superseded Secondary Address Line 2
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.SECONDARY_ADDRESS2]
The secondary version of the second line of the superseded user's primary address at the time the merge was conducted

Superseded Secondary Address Line 3
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.SECONDARY_ADDRESS3]
The secondary version of the third line of the superseded user's primary address at the time the merge was conducted

Superseded Secondary Address Line 4
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.SECONDARY_ADDRESS4]
The secondary version of the fourth line of the superseded user's primary address at the time the merge was conducted

Superseded Secondary City
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.SECONDARY_CITY]
The secondary version of the superseded user's city from their primary address at the time the merge was conducted

Superseded Secondary Degree
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.SECONDARY_DEGREE]
The secondary version of the superseded user's degree as recorded at the time the merge was conducted

Superseded Secondary Department
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.SECONDARY_DEPARTMENT]
The secondary version of the superseded user's department, from their primary address at the time the merge was conducted

Superseded Secondary First Name
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.SECONDARY_FIRSTNAME]
The secondary version of the superseded user's first name as recorded in their people record at the time of the merge

Superseded Secondary Institution
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.SECONDARY_INSTITUTE]
The secondary version of the superseded user's institution as recorded in their primary address record at the time the merge was conducted

Superseded Secondary Last Name
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.SECONDARY_LASTNAME]
The secondary version of the superseded user's last name as recorded in their people record at the time of the merge

Superseded Secondary Position
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.SECONDARY_POSITION]
The secondary version of the superseded user's position as associated with their primary address at the time the merge was conducted

Superseded State/Province [MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.ST]
The superseded user's state/province from their primary address at the time the merge was conducted

Superseded Secondary State/Province
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.STATE]
The secondary version of the superseded user's state/province from their primary address at the time the merge was conducted

Superseded Secondary Address Record Last Update
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.SUPERSEDED_ADDRESS_ALIAS_LASTUPDATE]
The last time the secondary version of the superseded user's primary address record was updated before the merge was conducted

Superseded Address Record Last Update
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.SUPERSEDED_ADDRESS_LASTUPDATE]
The last time the superseded user's primary address record was updated before the merge was conducted

Superseded Classifications
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.SUPERSEDED_CLASSIFICATIONS]
Semi-colon-delimited list of the classifications that were associated with the superseded people record at the time of the merge.

Superseded User's Editor Role
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.SUPERSEDED_EDITORROLE]
The editor role of the user as recorded in the superseded people record at the time of the merge

Superseded E-mail Address
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.SUPERSEDED_EMAIL]
The e-mail address of the user as recorded in the superseded primary address record before the merge was conducted (i.e. without the "MERGED" prefix)

Superseded Global User ID
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.SUPERSEDED_GUID]
The Global User ID of the user as recorded in the the people record that was superseded by the merge

Superseded Keywords
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.SUPERSEDED_KEYWORDS]
Semi-colon-delimited list of the keywords that were associated with the superseded user record at the time of the merge.

Superseded Secondary People Record Last Update
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.SUPERSEDED_PEOPLE_ALIAS_LASTUPDATE]
The last time the superseded user's secondary people information was updated before the merge was conducted

Superseded People ID
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.SUPERSEDED_PEOPLE_ID]
The ID of the people record that was superseded by the merge

Superseded People Record Last Update
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.SUPERSEDED_PEOPLE_LASTUPDATE]
The last time the superseded people record was updated before the merge was conducted

Superseded User's Publisher Role
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.SUPERSEDED_PUBLISHERROLE]
The Publisher Role (if any) assigned to the superseded user at the time the merge was conducted

Superseded User's Reviewer Role
[MERGE_DUPLICATE_USER_AUDIT_TRAIL.SUPERSEDED_REVIEWERROLE]
The Reviewer Role (if any) assigned to the superseded user at the time the merge was conducted

Superseded First Personal URL
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.URL1]
The superseded user's First Personal URL at the time the merge was conducted

Superseded Second Personal URL
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.URL2]
The superseded user's Second Personal URL at the time the merge was conducted

Superseded Third Personal URL
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.URL3]
The superseded user's Third Personal URL at the time the merge was conducted

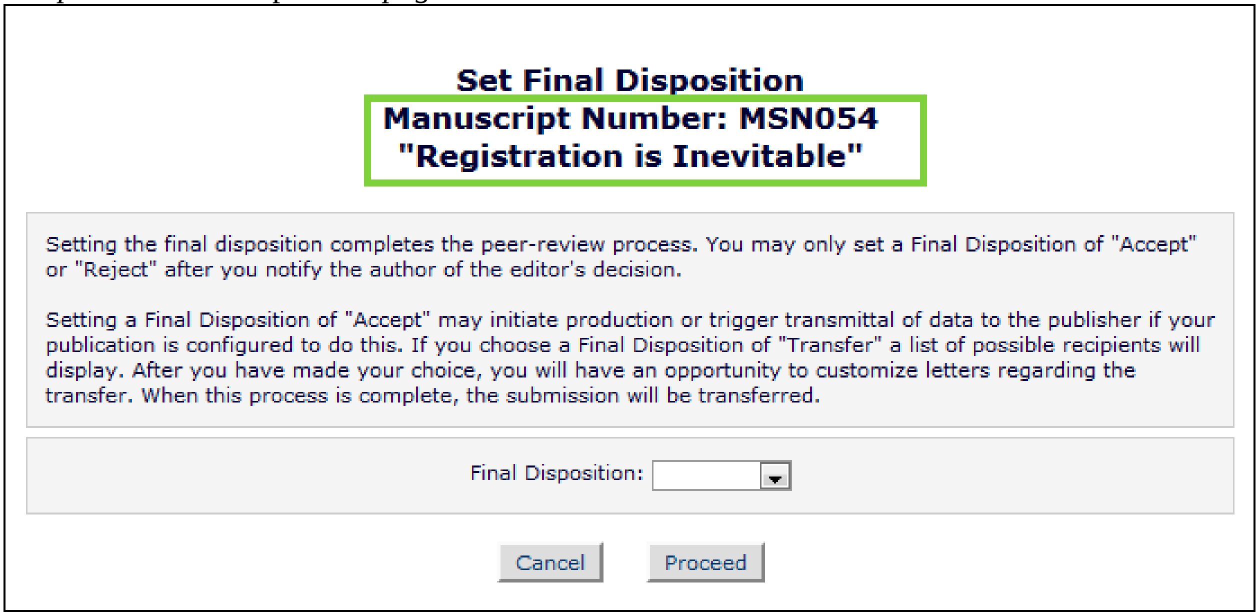
Superseded Zip/Postal Code
[MERGE_DUPLICATE_USERS_AUDIT_TRAIL_VIEW.ZIPCODE]
The superseded user's zip/postal code from their primary address at the time the merge was conducted

TO CONFIGURE:
No configuration necessary.

Increased Visibility to Manuscript Information

New in EM 11.0, the Article Title and Manuscript Number of the relevant submission are added to the *Set Final Disposition* and the *Reviewer Notification Letters* pages.

Sample Set Final Disposition *page:*



Set Final Disposition

Manuscript Number: MSN054
"Registration is Inevitable"

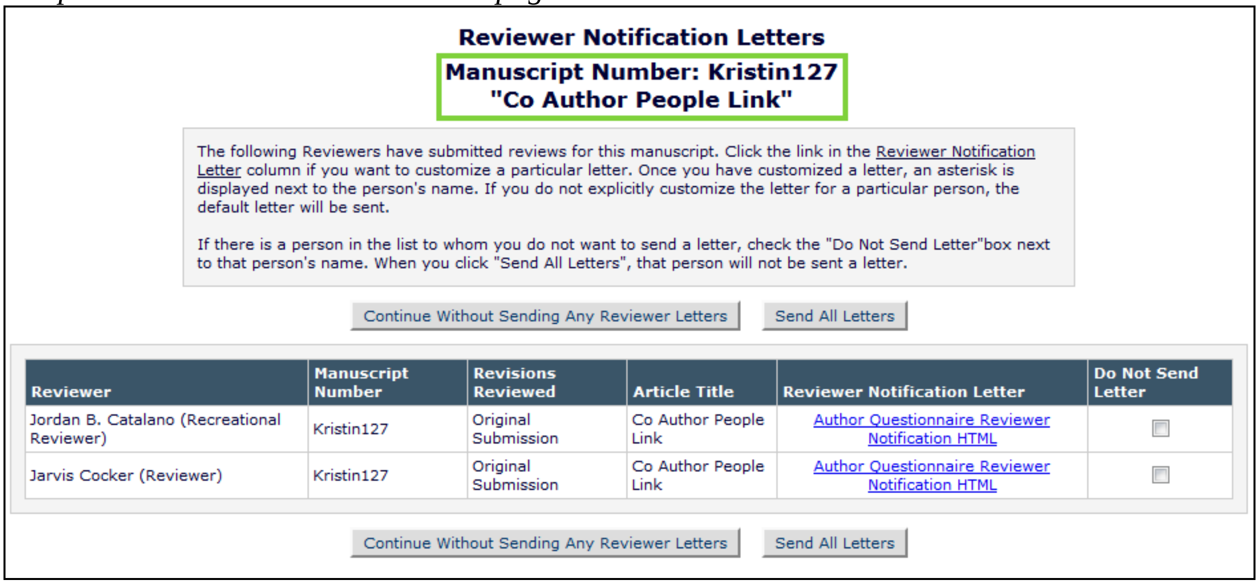
Setting the final disposition completes the peer-review process. You may only set a Final Disposition of "Accept" or "Reject" after you notify the author of the editor's decision.

Setting a Final Disposition of "Accept" may initiate production or trigger transmittal of data to the publisher if your publication is configured to do this. If you choose a Final Disposition of "Transfer" a list of possible recipients will display. After you have made your choice, you will have an opportunity to customize letters regarding the transfer. When this process is complete, the submission will be transferred.

Final Disposition:

Cancel Proceed

Sample Reviewer Notification Letters *page:*



Reviewer Notification Letters

Manuscript Number: Kristin127
"Co Author People Link"

The following Reviewers have submitted reviews for this manuscript. Click the link in the Reviewer Notification Letter column if you want to customize a particular letter. Once you have customized a letter, an asterisk is displayed next to the person's name. If you do not explicitly customize the letter for a particular person, the default letter will be sent.

If there is a person in the list to whom you do not want to send a letter, check the "Do Not Send Letter"box next to that person's name. When you click "Send All Letters", that person will not be sent a letter.

Continue Without Sending Any Reviewer Letters Send All Letters

Reviewer	Manuscript Number	Revisions Reviewed	Article Title	Reviewer Notification Letter	Do Not Send Letter
Jordan B. Catalano (Recreational Reviewer)	Kristin127	Original Submission	Co Author People Link	Author Questionnaire Reviewer Notification HTML	
Jarvis Cocker (Reviewer)	Kristin127	Original Submission	Co Author People Link	Author Questionnaire Reviewer Notification HTML	

Continue Without Sending Any Reviewer Letters Send All Letters

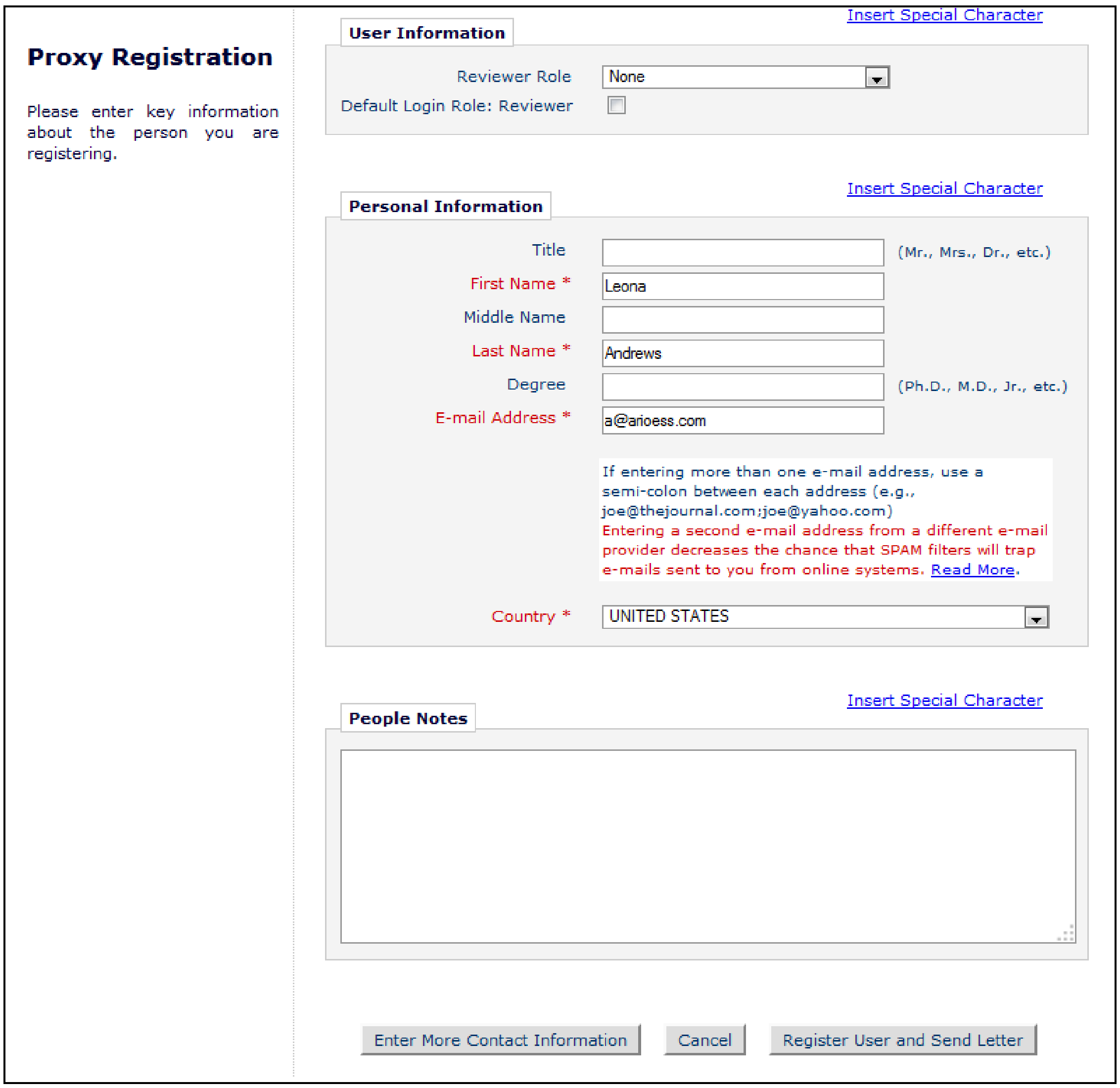
TO CONFIGURE:
No configuration necessary.

Enforce Notification after Proxy Registration

In EM/PM 10.2, administrators may proxy register a user and choose whether to send the newly-registered user a notification of their new user account.

For security purposes, some publications may wish to require that proxy registered users receive notification of their registration. New in EM/PM version 11.0, an Aries Account Coordinator can enable a feature that requires the administrator to send a letter to a newly proxy-registered user. This setting also requires that a valid e-mail address be provided for a user being proxy-registered.

Sample Proxy Registration *page – e-mail is required, no option to register without sending letter:*



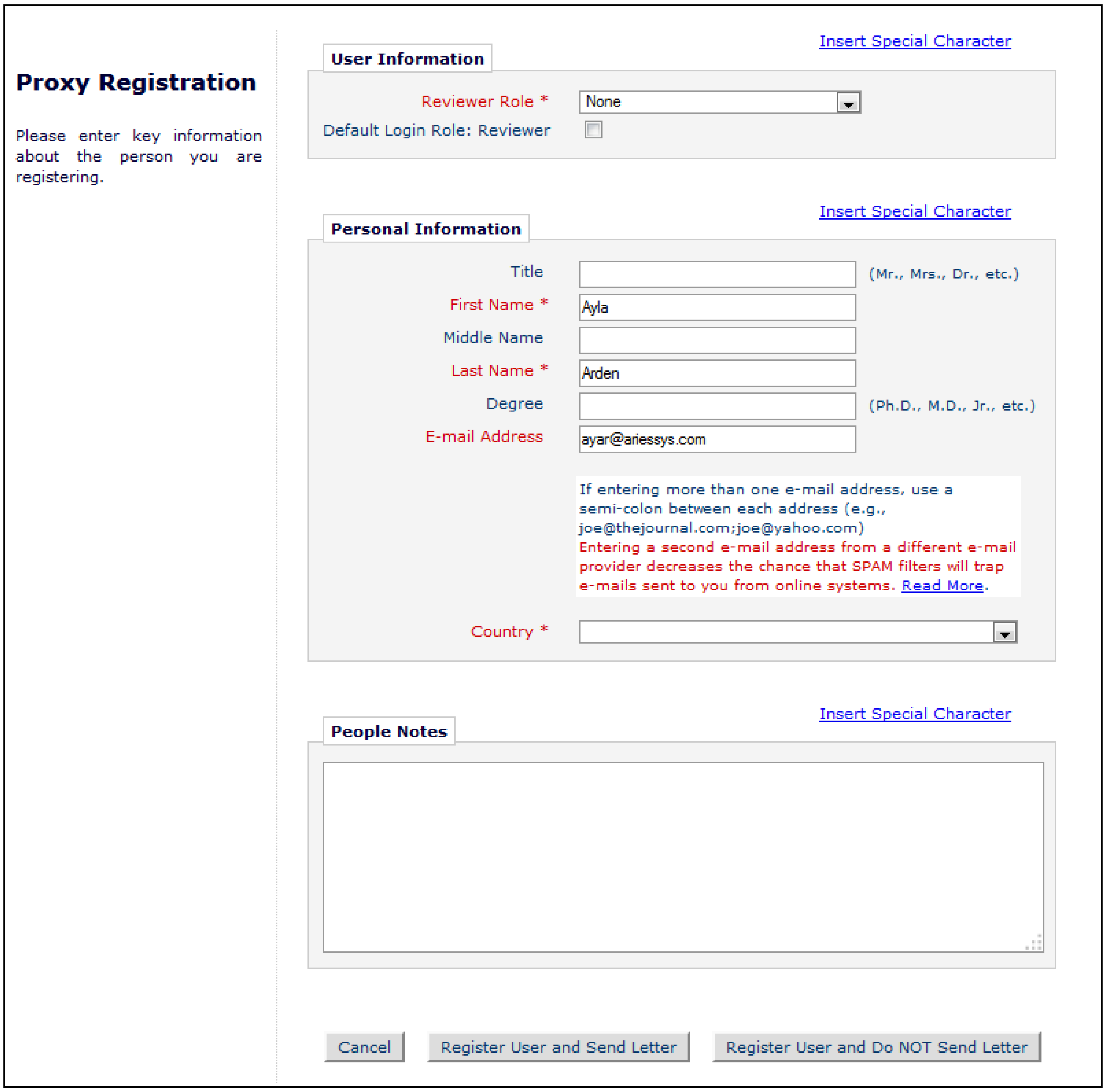
TO CONFIGURE:
This feature must be enabled by an Aries Account Coordinator.

Limited Contact Information Entry at Proxy Registration

In EM/PM 10.2, administrators may register other users and enter most of their personal information by clicking the 'Enter More Contact Information' button during proxy registration. This allows the administrator to add information such as address, contact information, personal identifiers, and institution information.

For security purposes, some publications may wish to require users to update their own personal information, rather than an administrator adding it during proxy registration. New in EM/PM 11.0, an Aries Account Coordinator may enable a setting that hides the 'Enter More Contact Information' button during proxy registration, preventing administrators from adding additional, detailed contact information about the new user.

Sample Proxy Registration *page – 'Enter More Contact Information' button is not available:*



TO CONFIGURE:
This feature must be enabled by an Aries Account Coordinator.

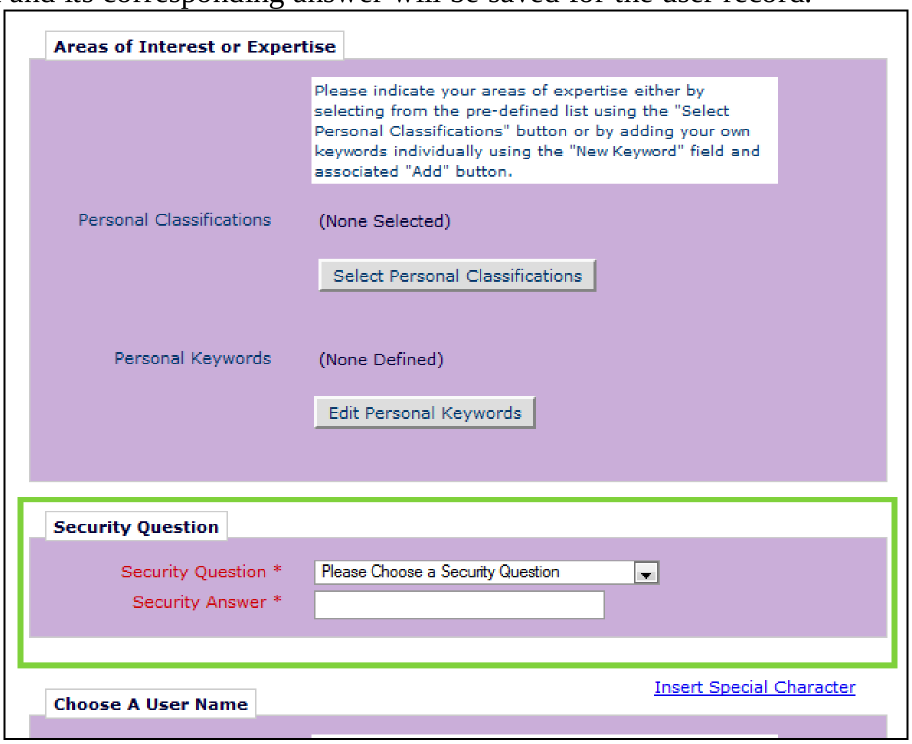
Enable Security Questions

New in EM/PM 11.0, account security questions may be enabled for all users. Once this feature has been enabled by an Aries Account Coordinator, 'Security Question' and 'Security Answer' are automatically added as required fields to the *Edit Registration Fields* and *Configure Expedited Reviewer Login* pages in PolicyManager. Editors and Publishers retrieving account information such as passwords and/or usernames will be required to provide the correct response to their previously selected and saved security question.

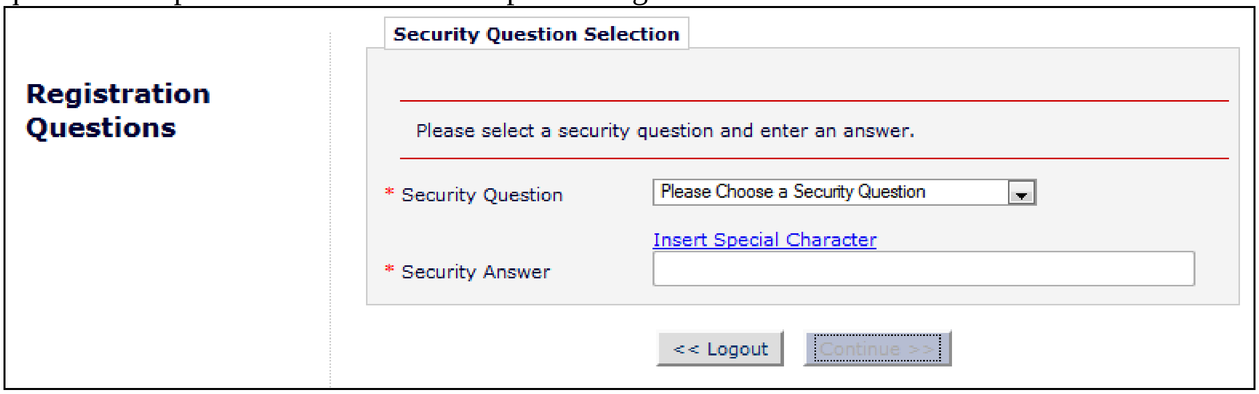
NOTE: For portal-linked (IJRS) publications, the security questions and answers will be synched across all publications for when the user record is synched, if all journals are configured with this feature.

NOTE: When user records are merged, the security question and answer for the retained user will apply to the new merged record. If the retained user did not have a security question and answer but the inactivated user did, the selections from the inactivated user are copied over to the retained user.

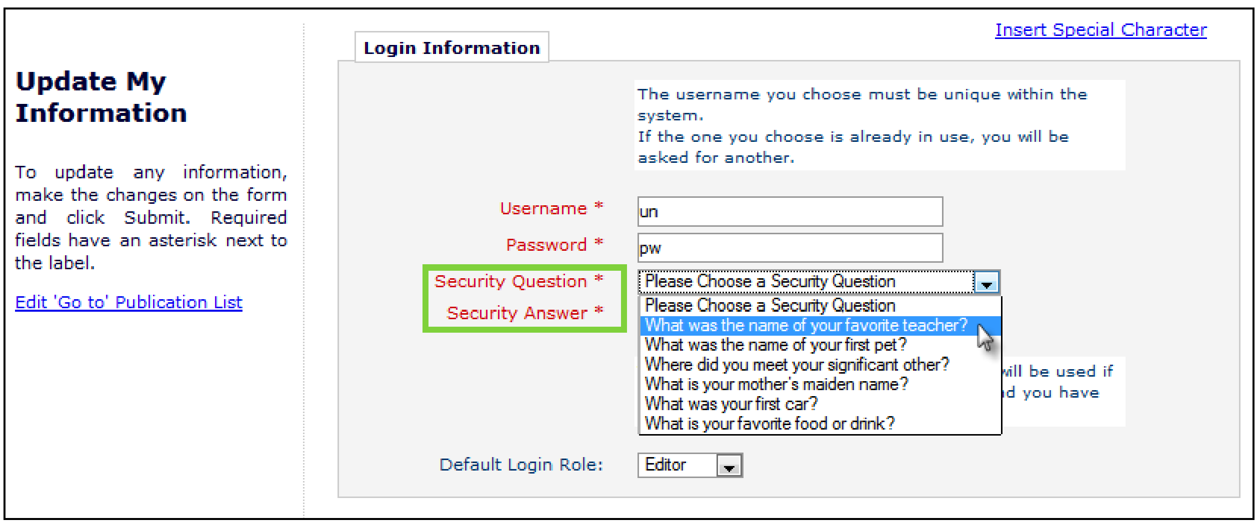
Users newly registering after the feature has been enabled will now be required to select from one of six predefined questions and provide an answer before proceeding with self-registration. One question and its corresponding answer will be saved for the user record.



Previously registered users logging into the system (either via the login page or a deep link that fully logs the user in) after the feature has been enabled will be required to select a security question and provide an answer before proceeding:



Users may view or update their security question and answer on the *Update My Information* page, accessed from the Menu bar.



NOTE: Security question information is not available to users accessing the Update My Information page in proxy mode. Additionally, Editors and Publishers may not add or change security information for users during Proxy Registration or from the *Update Information* page accessed from Search People results.

Editors and Publishers retrieving account information from the ‘Send Username and Password’ or ‘Send Password’ links will be required to provide the saved answer for their selected security question before the email can be sent.

Sample Validation page – Send Username/Password option configured for the publication:

TO CONFIGURE:
This feature must be enabled by an Aries Account Coordinator.

Restrict Personal Information Update

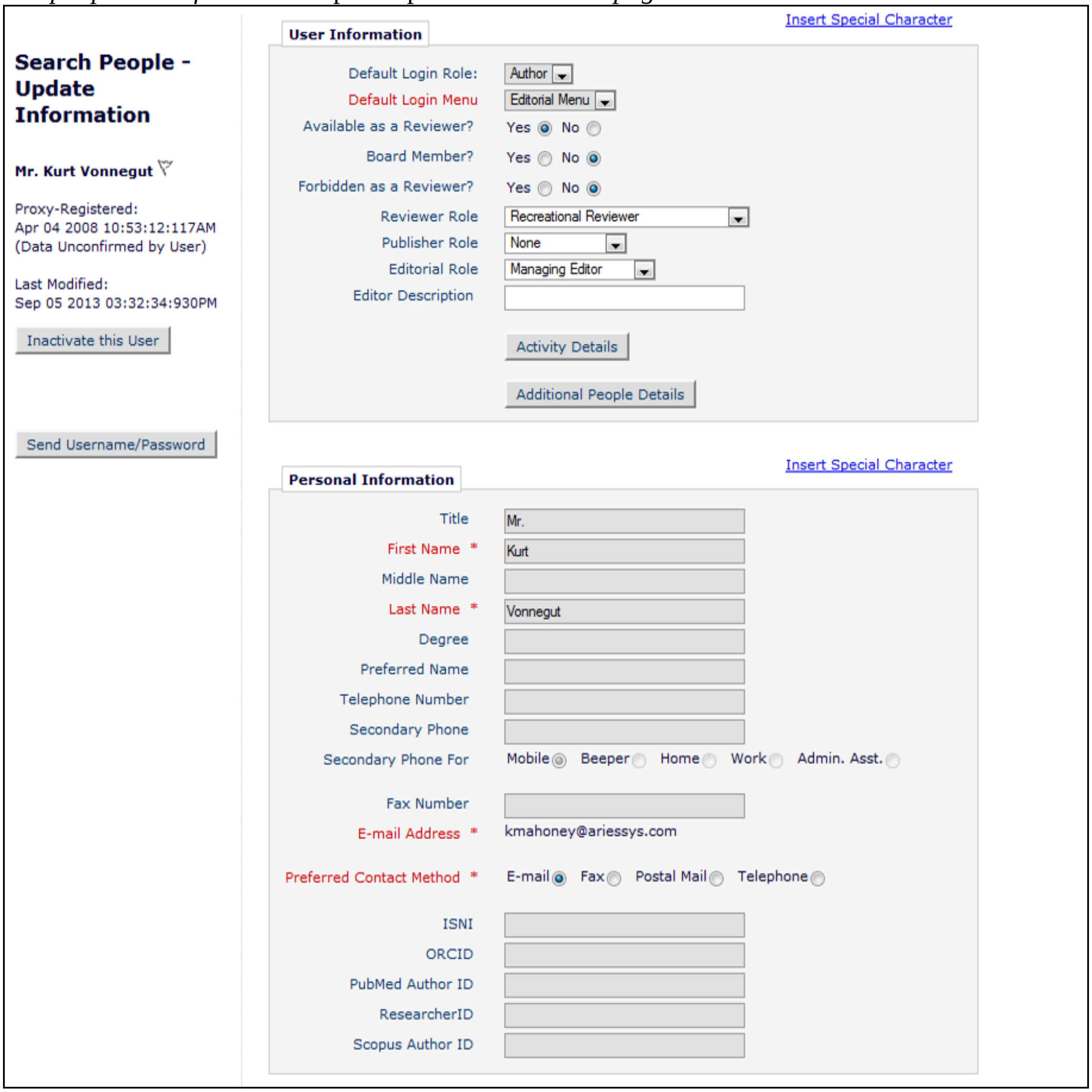
In EM/PM 10.2, Editors may have permission to edit or update other users' People Information by accessing a record from Search People results.

Some publications may have stricter security requirements for changing user information. In EM/PM version 11.0, a security feature may be enabled by an Aries Account Coordinator that prevents an editor from editing certain information for other users on the *Search People – Update Information* page.

NOTE: This setting may be applied globally or enforced only for users who have a security question and answer saved in the system.

Once this feature is enabled, many fields on the *Search People – Update Information* page will be read only. Username and password information will be hidden as well as the security question and answer (if configured).

Sample portion of Search People –Update Information *page:*



Editors with appropriate permissions will still be able to change or update the following information:

- Available as a Reviewer?
- Board Member?
- Forbidden as a Reviewer?
- Reviewer Role, Publisher Role, and Editor Role Designations (Editor Role Designation governed by 'Change Editor Role Designation to/from: permission in RoleManager)
- Editor Description

- Preferred Contact Method (governed by 'Change Preferred Method of Contact' permission in RoleManager)
- Select Personal Classifications
- Edit Personal Keywords
- People URLs (governed by 'Edit People URLs' permission in RoleManager)
- Unavailable Dates
- People Notes (governed by 'Edit People Notes' permission in RoleManager)

The 'Activity Details' and 'Additional People Details' buttons remain active and accessible.

NOTE: This feature only restricts Editors from updating other user's records. Users will still have full access to update their own personal information.

TO CONFIGURE:
This feature must be enabled by an Aries Account Coordinator.

PRODUCTION TRACKING ENHANCEMENTS

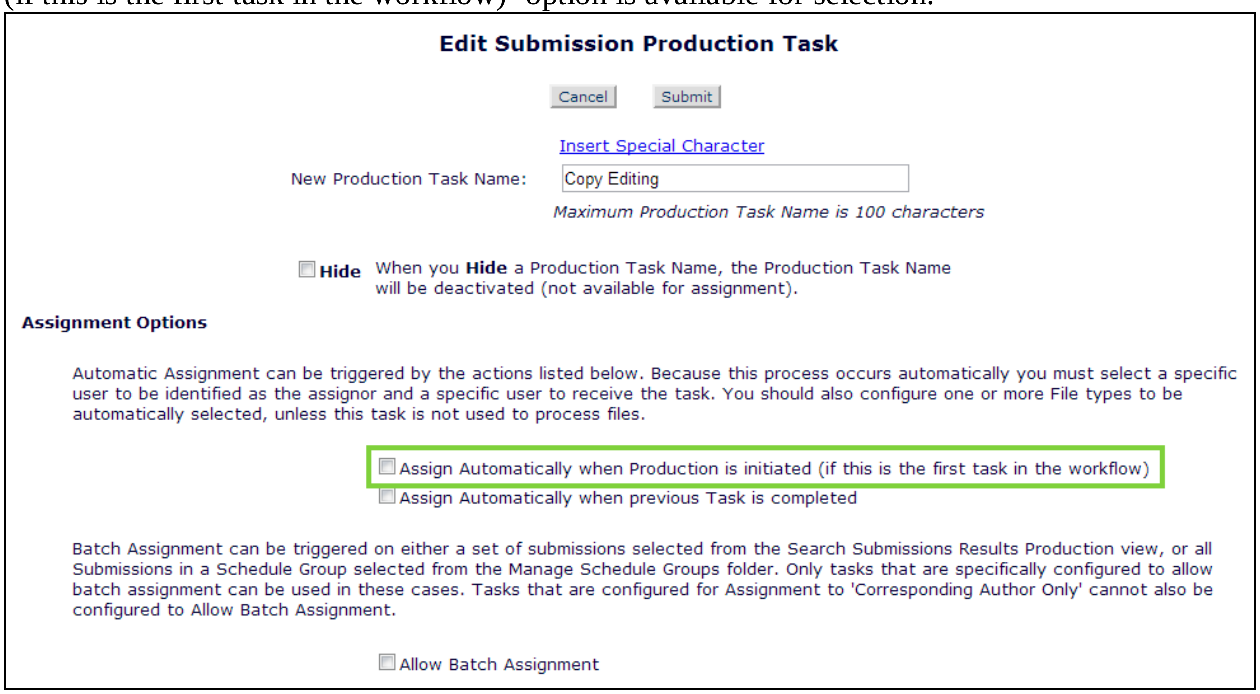
Automatic Production Initiation and Assign First Task

In version 10.2, Automatic Production Initiation may be configured for a submission when the Final Disposition is manually set to ‘Accept’, ‘Accept on Submission’, or ‘Accept and Transmit’ for Regular or Conference Submissions. After Production is automatically initiated, the submission moves to the ‘Production Initiated – No Tasks Assigned’ folder.

New in PM version 11.0, Production Initiation may be also be triggered when the Final Disposition is automatically set to ‘Accept’. Furthermore, the first Submission Production Task in a Submission Workflow may also be automatically assigned at the time of Production Initiation.

TO CONFIGURE:
In PolicyManager, go to Configure Submission Production Tasks and Add a new task or Edit an existing task.

In the ‘Assignment Options’ section, a new ‘Assign Automatically when Production is initiated (if this is the first task in the workflow)’ option is available for selection:


Edit Submission Production Task

Cancel Submit

Insert Special Character

New Production Task Name: Copy Editing

Maximum Production Task Name is 100 characters

Hide When you **Hide** a Production Task Name, the Production Task Name will be deactivated (not available for assignment).

Assignment Options

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assignor and a specific user to receive the task. You should also configure one or more File types to be automatically selected, unless this task is not used to process files.

Assign Automatically when Production is initiated (if this is the first task in the workflow)

Assign Automatically when previous Task is completed

Batch Assignment can be triggered on either a set of submissions selected from the Search Submissions Results Production view, or all Submissions in a Schedule Group selected from the Manage Schedule Groups folder. Only tasks that are specifically configured to allow batch assignment can be used in these cases. Tasks that are configured for Assignment to 'Corresponding Author Only' cannot also be configured to Allow Batch Assignment.

Allow Batch Assignment

Once selected, similar to the ‘Assign Automatically when previous Task is completed’ option, the page will refresh so users may select individual, eligible Editors and Publishers for ‘Can be Assigned by:’ and ‘Can be Assigned to:’. A single assignor and recipient must be selected for the task to be automatically assigned.

When this option is selected and Production is initiated (either manually or automatically):

1. The task is assigned by the preconfigured assignor to the preconfigured assignee.
2. Assignment Files configured to be selected automatically for the task are included.
3. If an Assignment Letter is configured for the task, it is sent.
4. The submission moves to folders on the Production Tasks menu, as if the task had been assigned manually.
5. All status and at-risk checks are performed, as if the task had been assigned manually.

Automatically Set Final Disposition

In EM/PM version 10.2, Final Disposition can be set automatically and the transmittal triggered when the Author is notified of an Editor Decision in the 'Accept' decision family. This setting is configured by Account Coordinators.

New for Production Tracking users in PM version 11.0, Article Types in the "Regular" Article Type Family may be configured in *PolicyManager* so that the Final Disposition is automatically set to 'Reject' when the Author is notified of selected Decisions in the 'Reject' Decision Family or the Final Disposition may be set to 'Accept' when the Author is notified of selected Decisions in the 'Accept' Decision Family.

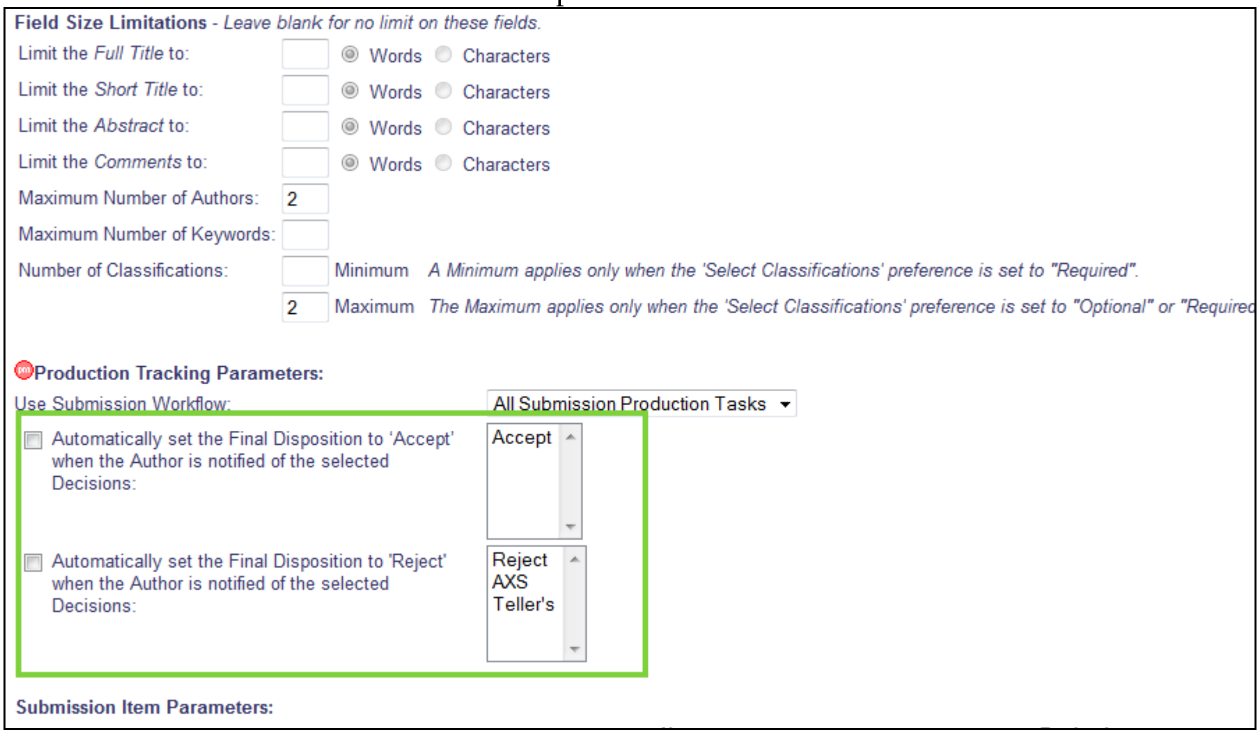
When an Article Type configured to automatically set the Final Disposition to 'Reject' after the Author is notified of a 'Reject' decision:

1. All events and database updates are triggered, as if Final Disposition has been manually set to 'Reject'.
2. Letters configured for the 'Final Disposition – Reject' event in *ActionManager* are sent, though no letters are required.

If an Article Type is configured to automatically set the Final Disposition to 'Accept' when an Author is notified of an 'Accept' Decision:

1. The final Disposition is set to 'Accept'.
2. The *Transmittal Form* page is bypassed.
3. The *Send Letters* page is bypassed, though letters will be sent if there is one configured in *ActionManager* for the 'Final Disposition – Accept' event.

TO CONFIGURE:
Production Tracking must be enabled and a Transmittal Method must not be specified.
Go to PolicyManager>Edit Article Types and Add a new Article Type or Edit an existing one. In the ‘Production Tracking Parameters’ section, the two new configuration options are displayed below the ‘Use Submission Workflow’ drop-down menu:



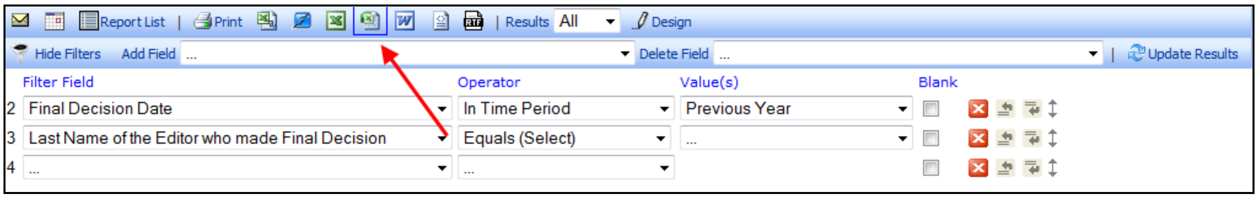
Select the checkbox next to either ‘Automatically set the Final Disposition to ‘Accept’ when the Author is notified of the selected Decisions:’ or ‘Automatically set the Final Disposition to ‘Reject’ when the Author is notified of the selected Decisions:’. Then , select the corresponding decisions for which you would like Final Disposition to be automatically set when the author is notified.

ENTERPRISE ANALYTICS REPORTING ENHANCEMENTS

Export Report in Excel 2007-2013 Format

In EM version 10.2, reports can be exported from the Enterprise Analytics Reporting ‘Report Viewer’ and ‘Report Designer’ toolbars in a MIME (.mht) file type.

New in EM version 11.0, reports may be exported from these toolbars in true Microsoft Excel 2007-2013 (.xlsx) format. A new button is added to the ‘Report Viewer’ and ‘Report Designer’ toolbars between the Excel Single-File Web Page and Microsoft Word exporting buttons:



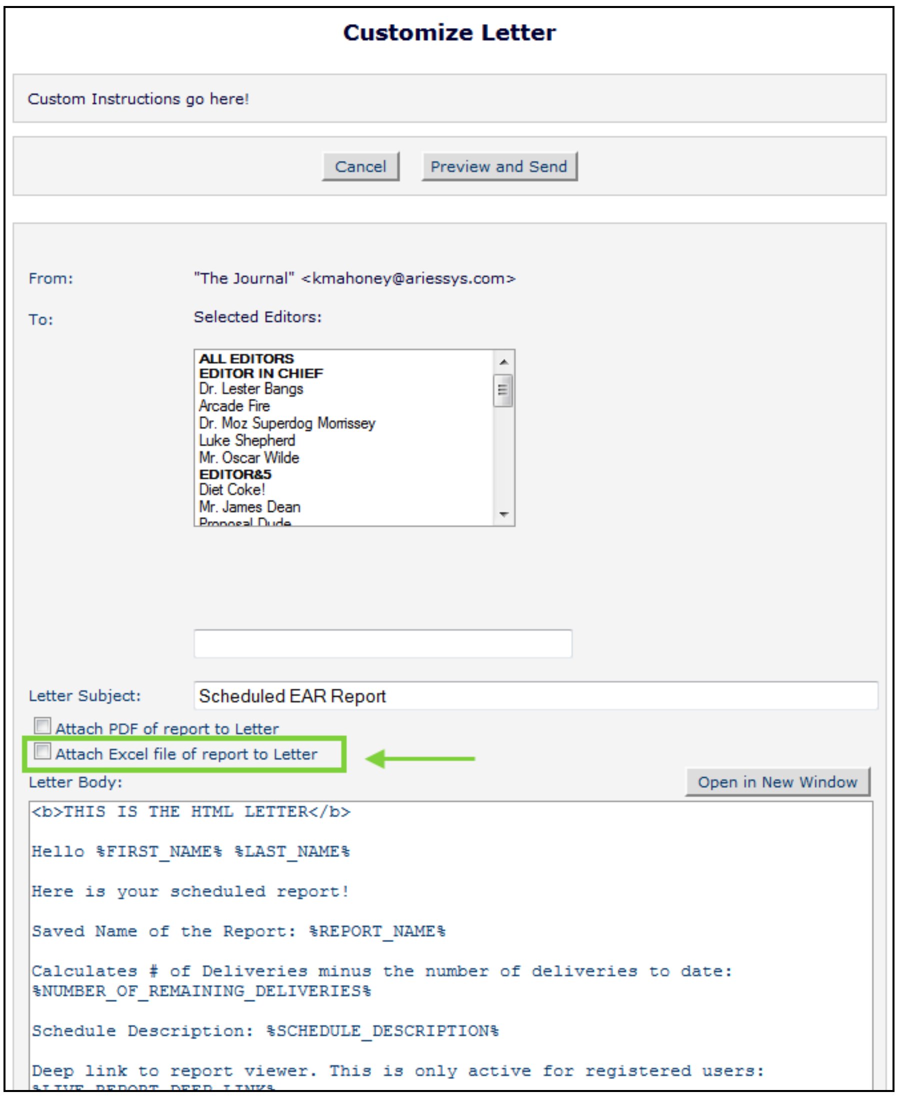
TO CONFIGURE:
No configuration necessary.

Excel Attachment for Email

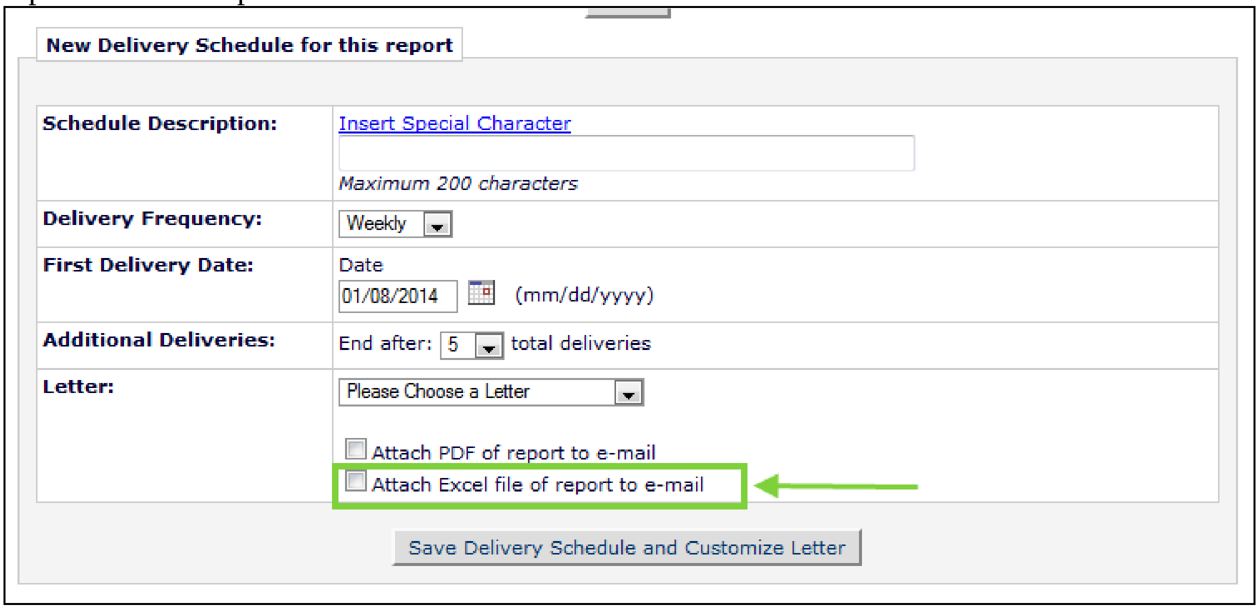
In EM version 10.2, a PDF version of a report may be attached to an email in the *Send Report by E-mail* Customize Letter page, accessed by clicking the e-mail icon in Enterprise Analytics Reporting. Additionally, a PDF version of a report may be attached to letters sent from scheduled reports, accessed and configured by clicking the scheduling (calendar) icon on the Main Menu, Report Viewer toolbar, or Report Designer toolbar.

New in EM version 11.0, users may attach a Microsoft Excel 2007-2013 file (.xlsx) version of the report to emails sent from the Enterprise Analytics Reporting interface, both by individual e-mail and scheduled reports.

TO CONFIGURE:
From the ‘Customize Letter interface, accessed by clicking the email icon on the EAR Main Menu, Report Viewer toolbar, or Report Designer Toolbar, a new ‘Attach Excel file or report to Letter’ option is added:



From the *Report Delivery Schedule* page, accessed by clicking the calendar icon on the EAR Main Menu, Report Viewer toolbar, or Report Designer toolbar, a new 'Attach Excel file of report to e-mail' option is added:



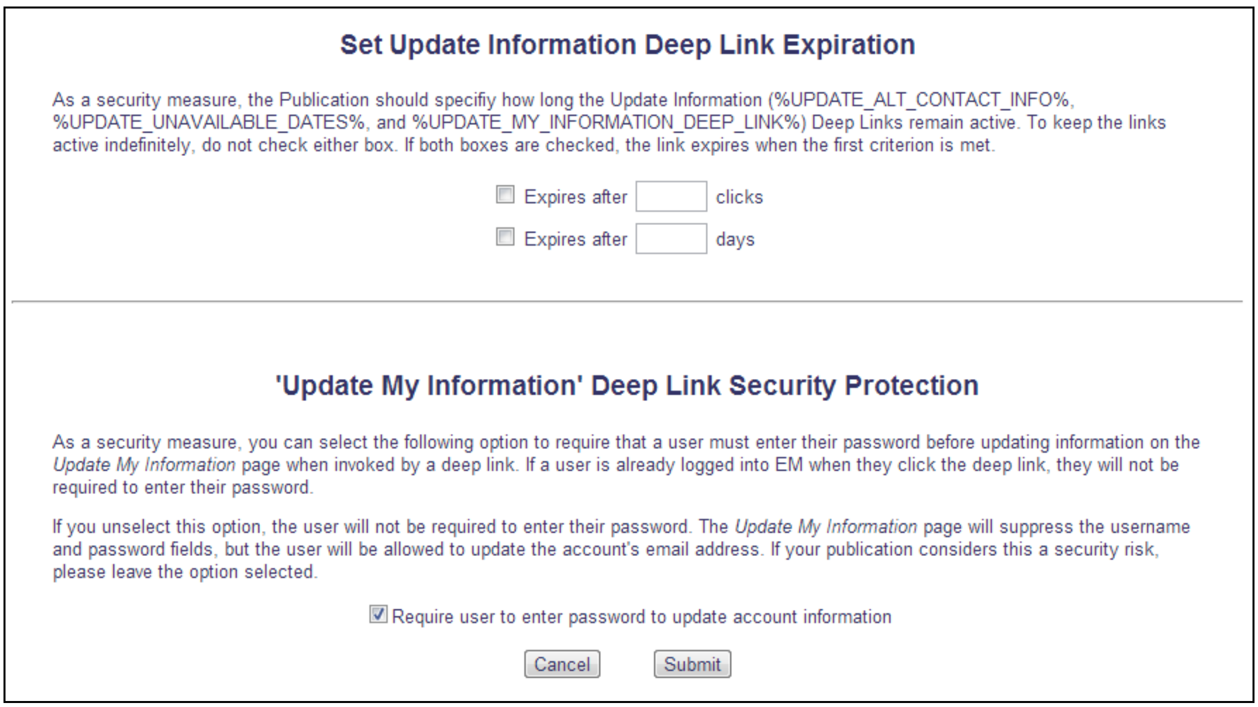
MERGE FIELD ENHANCEMENTS

Deep Link to Update My Information

In EM/PM version 10.2, users may update specific information via deep links used in letters. Currently, links to update alternate contact information (%UPDATE_ALT_CONTACT_INFO%) or to update unavailable dates (%UPDATE_UNAVAILABLE_DATES%) may be included in letters to allow direct access to these parts of the system quickly.

New in 11.0, a deep link merge field named %UPDATE_MY_INFORMATION_DEEP_LINK% is available for insertion into letters to any EM user role to allow easy access to the *Update My Information* page. When a user clicks the link created by the new merge field, they are navigated directly to the *Update My Information* page. Depending on the publication's configuration of the link, the user may or may not be required to enter their password before being able to proceed to the page.

TO CONFIGURE:
In PolicyManager, click the 'Set Update Information Deep Link' link under the General Policies section.



The top section of the page, 'Set Update Information Deep Link Expiration', allows a publication to specify how long Update Information deep links should remain active.

The lower section, "'Update My Information' Deep Link Security Protection", allows the publication to require users to enter a password before proceeding to update personal information from the %UPDATE_MY_INFORMATION_DEEP_LINK%. 'Require Users to enter password to update account information' is selected by default.

NOTE: If the user is already logged into EM when the deep link is clicked from the letter or if the user is asked to enter a password before proceeding, they may update all account information, including username, password, and email address. If the user is not currently logged into EM when the deep link is clicked and is not required to enter a password to proceed, the username and password fields are hidden, though the user's e-mail address may be updated.

Linked Reviewer Merge Fields

New in EM 11.0, Linked Submission Groups may enable ‘Review Sharing’. When this feature is enabled, reviews from all submissions across Linked Submission Groups may be selected to be included in the Reviewer Invitation/Assignment Letter. Selected reviews from Linked Submission Groups are aggregated using three new merge fields that may be added to the Reviewer Invitation Letter:

- **%LINKED_REVIEWER_COMMENTS_TO_AUTHOR%**
- **%LINKED_REVIEWER_COMMENTS_TO_EDITOR%**
- **%LINKED_REVIEWER_RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%**

NOTE: These are intended to be used in addition to the existing codes, which are still needed to insert Reviewer Responses from the current submission (%REVIEWER_COMMENTS_TO_AUTHOR%, %REVIEWER_COMMENTS_TO_EDITOR%, and %REVIEWER_RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%).

The **%LINKED_REVIEWER_COMMENTS_TO_AUTHOR%** merge field inserts the Reviewer Comments to Author from selected completed reviews from Linked Submissions. It groups reviews by submission and inserts identifying information from each submission as follows:

i) For each submission, the Manuscript Number and Article Title are listed:
    a. [MS Number]: “[Article Title]”
ii) For each review selected, the Comments to Author are then inserted with the preceding label:
    a. Reviewer <Reviewer Number> (Revision <Revision Number>)
    b. For reviews from an original submission (R0), the label is as follows:
        i. Reviewer <Reviewer Number> (Original Submission)

Sample format:

DEMO-D-14-00023: “Homeopathic Migraine Solutions”

Reviewer #1 (Original Submission): [Reviewer Comments to Author]

Reviewer #1 (Revision 1): [Reviewer Comments to Author]

DEMO-D-14-00014: “The Effects of Sumatriptan on the Brain”

Reviewer #1 (Original Submission): [Reviewer Comments to Author]

Reviewer #3 (Revision 1): [Reviewer Comments to Author]

The **%LINKED_REVIEWER_COMMENTS_TO_EDITOR%** merge field inserts the Reviewer Comments to Editor from selected completed reviews from Linked Submissions. Similar to **%LINKED_REVIEWER_COMMENTS_TO_AUTHOR%**, it groups reviews by submission and inserts identifying information from each submission as follows:

i) For each submission, the Manuscript Number and Article Title are listed:
    a. [MS Number]: “[Article Title]”

ii) For each review selected, the Comments to Editor are then inserted with the preceding label:
    a. Reviewer <Reviewer Number> (Revision <Revision Number>)
    b. For reviews from an original submission (R0), the label is as follows:
        i. Reviewer <Reviewer Number> (Original Submission)

Sample format:
DEMO-D-14-00025: “Review Sharing for Linked Submissions”

Reviewer #1 (Original Submission): [Reviewer Comments to Editor]

Reviewer #1 (Revision 1): [Reviewer Comments to Editor]

DEMO-D-14-00016: “Linked Submission Group Test Plan”

Reviewer #1 (Original Submission): [Reviewer Comments to Editor]

Reviewer #3 (Revision 1): [Reviewer Comments to Editor]

The new **%LINKED_REVIEWER_RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%** merge field inserts all Custom Reviewer Questions and responses where the question is configured with the ‘Available for Decision Letter Merging’ option set plus the Comments to Author field from the Review records selected for inclusion from the Linked Submission Groups as follows:

i) For each submission, the Manuscript Number and Article Title are listed:
    a. [MS Number]: “Article Title”

ii) For each Reviewer Assignment inserted, reviews appear in Revision number order with all Custom Reviewer Questions, Responses, and Comments from the same review appearing together:
    a. The Custom Questions and Responses are displayed first, with the Response displayed below.
        i. Each individual response is prefixed by a Reviewer identifier string:
            1. Reviewer <Reviewer Number> (Revision <Revision Number>):
            2. For reviews from an original submission (R0), the identifier string is as follows:
                a. Reviewer <Reviewer Number> (Original Submission):

b. The Comments to Author are displayed after the Custom Questions and Responses.
    i. The Comments are preceded by another Reviewer identifier string along with a ‘Comments to Author’ label:
        1. Reviewer <Reviewer Number> Comments to Author (Revision <Revision Number>):
        2. For reviews from an original submission (R0), the identifier string is as follows:
            a. Reviewer <Reviewer Number> Comments to Author (Original Submission)

Sample format:
DEMO-D-14-00056 “Linked Submission Review Sharing with Custom Questions”

Could this paper be better?

Reviewer 1 (Original Submission): Yes, I think so

Do you have any suggestions?

Reviewer 1 (Original Submission): Perhaps buy a dictionary!

Reviewer 1 Comments to Author (Original Submission): Spelling errors abound! Editor needed!

Could this paper be better?

Reviewer 1 (Revision 1): Maybe, but not drastically.

Do you have any suggestions?

Reviewer 1 (Revision 1): No.

Reviewer 1 Comments to Author (Revision 1): Such an improvement!

Could this paper be better?

Reviewer 2 (Original Submission): Absolutely.

Do you have any suggestions?

Reviewer 2 (Original Submission): Scrap it and start over!

Reviewer 2 Comments to Author (Original Submission): Yikes! Unreadable!

Could this paper be better?

Reviewer 2 (Revision 1): It can always be better.

Do you have any suggestions?

Reviewer 2 (Revision 1): Clarification of process needed.

Reviewer 2 Comments to Author (Revision 1): This is much better, but still needs work.

NOTE: All Linked Reviewer merge fields are merged into the Customize Letter interface so Editors may update the information

Individual Reviewer Comments to Author Merge Fields for Decision Letters

New in 11.0, publications may choose to keep the Reviewer Comments to Author separate from the Editor Comments. These individual Reviewer Comments to Author may be selected for inclusion in the Decision/Author Notification letter. To accommodate this, two new merge fields are introduced:

- **%INDIVIDUAL_REVIEWER_COMMENTS_TO_AUTHOR%**
- **%RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%**

The **%INDIVIDUAL_REVIEWER_COMMENTS_TO_AUTHOR%** merge field may be used in Decision Letters and Reviewer Notifications of an Editor Decision. The merge field pulls in Individual Reviewer Comments that were selected for inclusion by the Editor who made the decision being notified as follows:

i) Reviewer [Reviewer Number]: [Individual Comments to Author]

Sample format:
Reviewer 1: I'm not so sure about this paper – could use a second set of eyes.

Reviewer 2: Send back for more editing – the formula on page 12 is incorrect.

NOTE: This merge field will populate on the Notify Author page so Editors may redact or update comments. When the merge field is used in Reviewer Notification of Editor Decision letters, the merge field will not populate on the *Customize Letter* interface to allow further editing.

The **%RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%** merge field is available for use in Decision Letters to Authors and Reviewer Notifications of Editor Decision. The merge field inserts the Individual Reviewer Comments to Author that were selected for inclusion as well as all Responses to Custom Review Questions configured as 'Available for Decision Letter Merging. The Custom Review Question Responses displayed are also dependent on either of the following:

1. The Custom Review Question grid was displayed to the Editor and they selected the 'Include in Notification' option during a Submit Editor Decision session or
2. The Custom Review Question grid was not displayed to the Editor (i.e. Hidden on the Editor Form) – in this case, the system assumes all question configured for Decision Letter Merging will be included by default.

The merged Reviews and Comments are grouped by Reviewers, preceded by a Reviewer identifier string:

i) The Custom Question is displayed.
ii) One the next line, 'Reviewer [Reviewer Number]: [Response to Question]' is displayed
iii) If available and selected for inclusion, the Individual Reviewer Comments to Author is displayed on the next line, preceded by 'Reviewer [Reviewer Number] Comments to Author: [Individual Comments to Author]'

a. Nothing is inserted if the Individual Comment is blank or was not selected for inclusion by the Editor of the current version.

Sample format:
How did you feel about the paper?

Reviewer 1: I feel like this paper is a triumph of modern science.

Do you have any suggestions?

Reviewer 1: No. This cannot possibly be improved.

Reviewer 1 Comments to Author: The author definitely deserves an award for this.

How did you feel about the paper?

Reviewer 2: It was okay. To be honest, I just read the abstract.

Do you have any suggestions?

Reviewer 2: I cannot offer any advice. I ran out of time!

Reviewer 2 Comments to Author: The abstract was great and I was too busy having fun on vacation to read the rest.

NOTE: This merge field is populated in the *Notify Author* Letter Customization page so an Editor may sanitize the information as necessary.

Individual Reviewer Comments Merge Field for Reviewer Invitations

In EM 10.2, Editors may choose to include previously submitted Reviews for a submission in the Reviewer Invitation/Assignment letter. This is done by using the %REVIEW_COMMENTS_TO_AUTHOR% merge field. There is no mechanism for including any Custom Questions and Responses from the review.

New in 11.0, publications may want to include both Reviewer Comments to Author and Custom Review Question Responses from previously submitted Reviews in the Reviewer Invitation/Assignment. The new **%REVIEWER_RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%** merge field does this, grouping all information by Reviewer.

For each Reviewer Assignment selected for inclusion on the *Select Reviewers – Confirm Selections and Customize Letters* the merge field inserts:

i) If available, all Custom Questions configured as 'Visible to Other Reviewer' on the Review Form used to submit each selected Review are included as:
   a. The Custom Question text.
   b. On the next line, 'Reviewer [Reviewer Number]: [Response to Question]' is displayed
      i. If the response is from a previous revision, the Reviewer identifier string is:
         1. 'Reviewer [Reviewer Number] (Previous Version): [Response to Question]

ii) If available, the Reviewer Comments to Author is displayed on the next line, preceded by 'Reviewer [Reviewer Number] Comments to Author: [Comments to Author]
   a. For reviews from a previous revision, the Reviewer identifier string is:
      i. 'Reviewer [Reviewer Number] (Previous Version) Comments to Author: [Comments to Author]

Sample format:
On a scale of 1-10, what would you rate this paper?
Reviewer 1 (Previous Version): 5

Were the supplied figures sufficient?
Reviewer 1 (Previous Version): Yes.

Reviewer 1 (Previous Version) Comments to Author: I am not confident that this should go to print as is.

On a scale of 1-10, what would you rate this paper?
Reviewer 2: 7

Were the supplied figures sufficient?
Reviewer 2: No, the graph on page 34 has a mislabeled axis.

Reviewer 2 Comments to Author: Please fix aforementioned figure.